

SiteManager **Training Manual**



Module E
Chapter 1

Change Orders
Change Order Maintenance (+)

Creating a Change Order

Student's Version

Indiana Department of Transportation
June 2008, Version 3.7b

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Change Orders Overview

This section summarizes the topics necessary to create, review, print, approve, reject and track a change order.

CREATING CHANGE ORDERS

There are four types of change orders that will be utilized by INDOT. The modules for creating these change orders are listed below.

Overrun/Underrun Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Overrun and Underrun Change Order Items
- Change Order Explanations

Extra Work Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Extra Work Item
- Change Order Explanations
- Force Account

Time Adjustments Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Time Adjustments
- Change Order Explanations

Zero Dollar Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Explanations

Final Quantity Change Order

- Not to be utilized by INDOT

NOTE: Overrun/Underrun, Extra Work, and Time Adjustments Change Orders can all occur on one change order as long as they all have the same Reason Code. No items or time adjustments can be created on a Zero Dollar Change Order.

CHANGE ORDER APPROVAL PROCESS

The sections for approving a change order are listed below.

Forwarding a Change Order for Review - Optional

Reviewing a Change Order - Optional

Viewing an Attachment

Printing the Change Order Document

Placing a Change Order in Pending Status

Approving or Rejecting a Change Order

When a Change Order is Rejected

Tracking a Change Order

Error Messages

MISCELLANEOUS

After the change order is approved, it is complete.

Items may now be posted using a **Daily Work Report (DWR)**.

A change order may be deleted if it is in draft status and if all change order items, time extensions and explanations have been deleted from the change order.

NOTE: The Change Order Report printing process will not work in the Training Database. The user must log into SiteManager via CITRIX and print out a Change Order from an existing Contract.

NOTE: For this training document log into SiteManager as:

PE/S: d90bclip

Area Engineer: d90ffarm

Contractor: txxphann

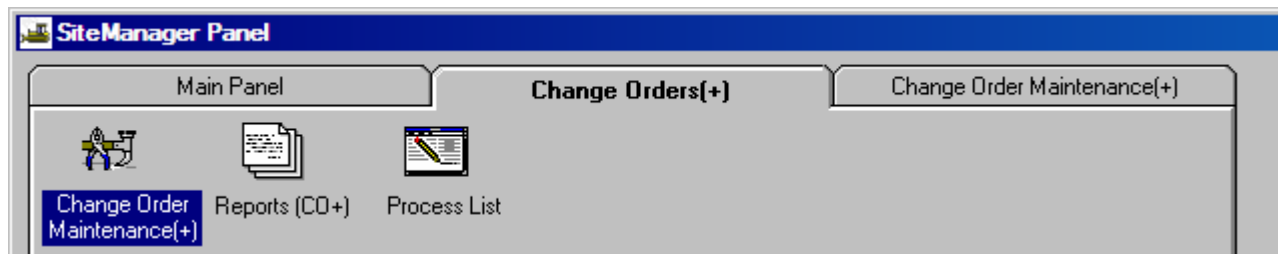
Passwords are all: pass

Creating a Overrun/Underrun Change Order Adding to or Removing Quantity from Existing Items.

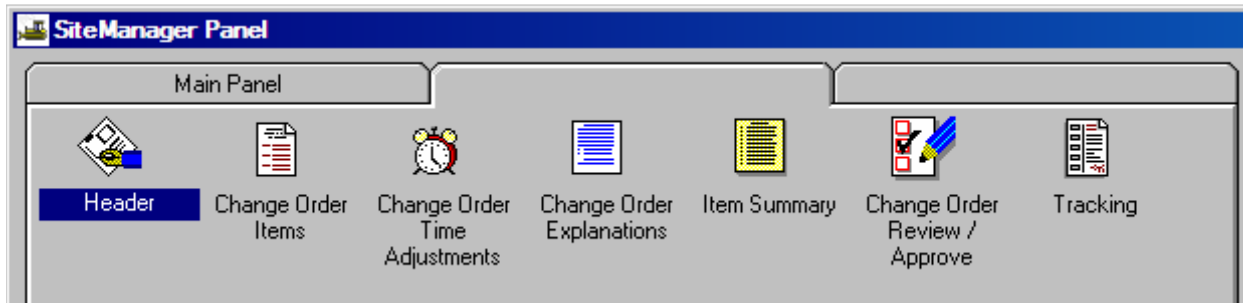
This is the first step in creating a Overrun/Underrun change order is to create a header.



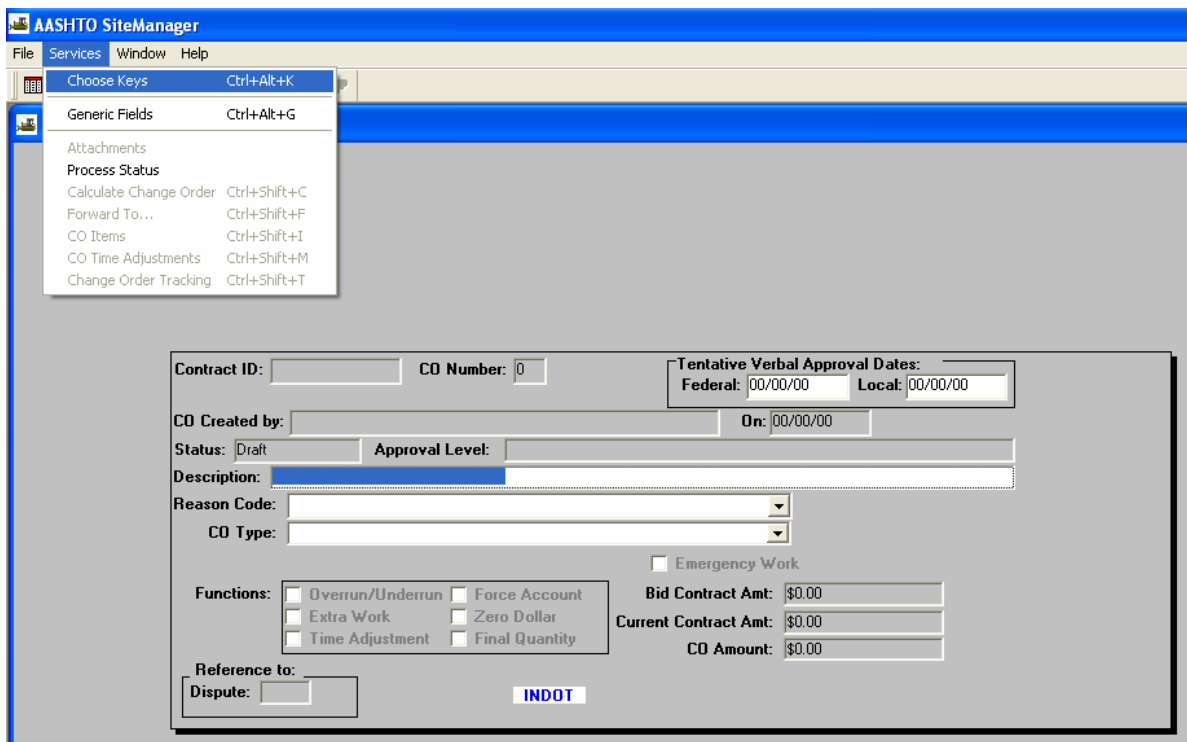
From the Main Panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**



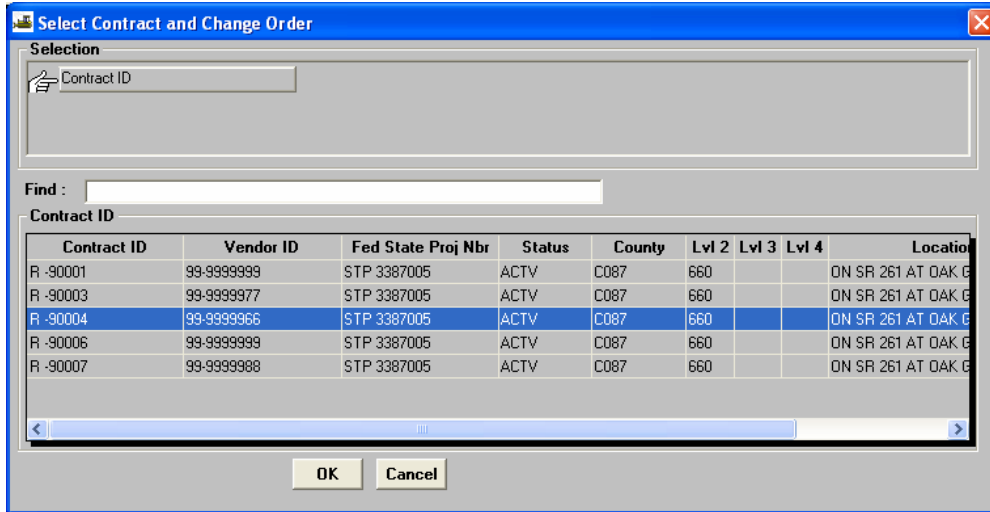
“Double-click” **Header**.



The **Header** window will open.

“Click” on **Services** located on the menu bar.

“Click” on **Choose Keys**.



The **Select Contract and Change Order** panel opens.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

“Double-click” on the appropriate **Contract ID**

AASHTO SiteManager
File Services Window Help

Header

Contract ID: R-90004 CO Number: 002 Tentative Verbal Approval Dates:
Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/16/07

Status: Draft Approval Level:

Description: Enter a Short Description of the Change Order

Reason Code: CO Type:

☐ Emergency Work

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35
Current Contract Amt: \$658,493.35
CO Amount: \$0.00

Reference to: Dispute: **INDOT**

The **Header** will open up with the **Contract ID** filled in.

CO Number: The **CO Number** is automatically populated by with the next available number.

CO Created by: The **CO Created** by field is automatically populated with the **User ID** who created this change order.

On: The **On** field is automatically populated with the date that the Change Order was created.

Status: The **Status** field is automatically populated with **Draft** until items have been added to the Change Order.

Approval Level: The **Approval Level** field is automatically populated with the highest level a approval needed based on INDOT's current policy.

Description: this field is used to enter a short general description for entire change order.

Reason Code: the **Reason Code** should clearly identify one specific impact to the Contract, the following are the general **Reason Codes**:

- **Errors & Omissions:** Errors and/or Omissions in the Contract Documents which prevents the contract from being constructed as intended.
- **Constructability:** Ability to be constructed.
- **Scope Changes:** A change in the project limits or design that revises the original intent of the Contract.
- **Changed Field Conditions:** Either an existing or new condition that could not have been reasonably foreseen by either INDOT or the Contractor prior to beginning the work.
- **Failed Material:** Material failures that result in penalties, reduced payment or replacement of items of work.
- **Incentive/Disincentive:** Monetary rewards or penalties added to a contract in addition to the normal Liquidated Damages clause.
- **Standards/Specs Change:** A change in the Contract Specifications as a result of a Department decision to initiate changes to active contracts on a Statewide basis.
- **Final Quantity Adjustment:** This is not utilized by INDOT.

“Click” on the **Reason Code** drop-down list.

“Click” on an appropriate **Reason Code**.

NOTE: A new change order will be written for each separate **Reason Code**.

AASHTO SiteManager
File Services Window Help

Header

Contract ID: R-90004 CO Number: 002 Tentative Verbal Approval Dates:
Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/16/07

Status: Draft Approval Level:

Description: Enter a Short Description of the Change Order

Reason Code: ERRORS & OMISSIONS, Design Related

CO Type: CHANGE ORDER

Functions:

CHANGE ORDER	\$658,493.35
TIME EXTENTION AGREEMENT	\$658,493.35
FORCE ACCOUNT	\$658,493.35
LIQUIDATED DAMAGES	\$0.00
SUPPLEMENTAL AGREEMENT	

Reference to Dispute: INDOT

CO Type: identifies the specific type of Change Order.

“Click” on the appropriate change order type from the **CO Type** drop-down list.

- **Claim:** additional compensation due for work or material not clearly covered in the contract or not ordered as extra work.
- **Change Order:** A written order issued to the Contractor covering changes in the contract and establishing payment for the work affected by the changes.
- **Time Extension Agreement:** To adjust the completion time of a contract to best accomplish the scheduling objectives of the State.
- **Force Account:** Extra work in the contract for which the Contractor and the Department cannot reach agreement on the unit price or lump sum price prior to performing the work.
- **Liquidated Damages:** Monetary penalty, established in the contract, charged against the amount due the contractor for failure to complete within the time allotted for construction.
- **Supplemental Agreement:** Any agreement between INDOT and the Contractor subsequent to and in addition to the contract.

Contract ID: R-90004	CO Number: 002	Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00	
CO Created by: Clipper, Buzz		On: 12/16/07	
Status: Draft	Approval Level:		
Description: Enter a Short Description of the Change Order			
Reason Code: ERRORS & OMISSIONS, Design Related			
CO Type: CHANGE ORDER			
Functions: <input checked="" type="checkbox"/> Overrun/Underrun <input type="checkbox"/> Force Account		<input checked="" type="checkbox"/> Emergency Work	
<input type="checkbox"/> Extra Work <input type="checkbox"/> Zero Dollar		Bid Contract Amt: \$658,493.35	
<input type="checkbox"/> Time Adjustment <input type="checkbox"/> Final Quantity		Current Contract Amt: \$658,493.35	
		CO Amount: \$0.00	
Reference to:			
Dispute:		INDOT	

Emergency Work check box: In order to expedite the Change Order Review/Approval process, the user can select this indicator, which is linked to an ‘Emergency’ indicator on the **Change Order Review/Approval** window. The Emergency indicator alerts approvers that the change order is for **Emergency Work**.

“Click” the **Emergency Work** check-box if this change order involves emergency work.

The purpose of the Change Order is defined as its **Function**. With the exceptions of the **Zero Dollar** and the **Final Quantity** change orders, a change order may have multiple functions checked, but they must be related to the same **Reason Code**.

“Click” the appropriate check boxes from the **Function** field:

- **Overrun/Underrun** – **Overrun/Underrun** is used when quantity is added or subtracted from an existing contract item.
- **Extra Work** – **Extra Work** is used when additional work items are required to complete the contract.
- **Time Adjustment** – **Time Adjustment** is used when the time needs to be adjusted to reflect the changed time period for a milestone or contract.
- **Force Account** – **Force Account** is used for extra work in the contract for which the Contractor and the Department cannot reach agreement on the unit price prior to performing the work. A **Force Account** CO requires adding a new line item to the contract. Only one new line item is allowed per **Force Account** change order.
- **Zero Dollar** – **Zero Dollar** is used for contract adjustments that will not affect the dollar amount of the contract. **Zero Dollar** change orders *cannot* include any other functions.
- **Final Quantity** – **Final Quantity** will not be utilized by INDOT. INDOT will use **Overrun/Underrun** Change Orders to balance quantities at the end of a contract.

If the change order is related to a **Dispute**, “right-click” on the **Dispute** field within the **Reference to:** box and “click” on **Search**.

Dispute ID	Dispute Category Type	Requested Amount	Status Type	Settled Amount	Resolved
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“Double-click” on the appropriate **Dispute ID**.


The selected **Dispute ID** number will populate the **Referenced to:** field.

“Click” on the Generic Field  located on the toolbar.

Additional Information for the Change Order Approval Checklist Document opens up. “Enter” the appropriate **Date Generated** for the Change Order.

To close “Click” on the Generic Field  located on the toolbar.

“Click” the **Save**  button located on the toolbar.

Documents can be added to the change order Header by using the **Attachments**  button.

Refer to **A-2-11-2 Attaching a Document** for further information on attaching a document to this change order

The next step in the creation of a Change Order is to make the adjustments to the existing Contract Items.

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and 'CO Items' is highlighted. The main window displays a form for creating a Change Order. The form includes fields for Contract ID (R-90004), CO Number (002), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). The CO Created by field is filled with 'Clipper, Buzz' and the On date is '12/16/07'. The Status is set to 'Draft' and the Approval Level is empty. The Description field contains 'Enter a Short Description of the Change Order'. The Reason Code is 'ERRORS & OMISSIONS, Design Related' and the CO Type is 'CHANGE ORDER'. The Emergency Work checkbox is checked. The Functions section includes checkboxes for Overrun/Underrun, Extra Work, Time Adjustment, Force Account, Zero Dollar, and Final Quantity. The Bid Contract Amt is \$658,493.35, the Current Contract Amt is \$658,493.35, and the CO Amount is \$0.00. The Reference to field is empty and the Dispute field is 'INDOT'.

“Click” on **Services** located on the toolbar.

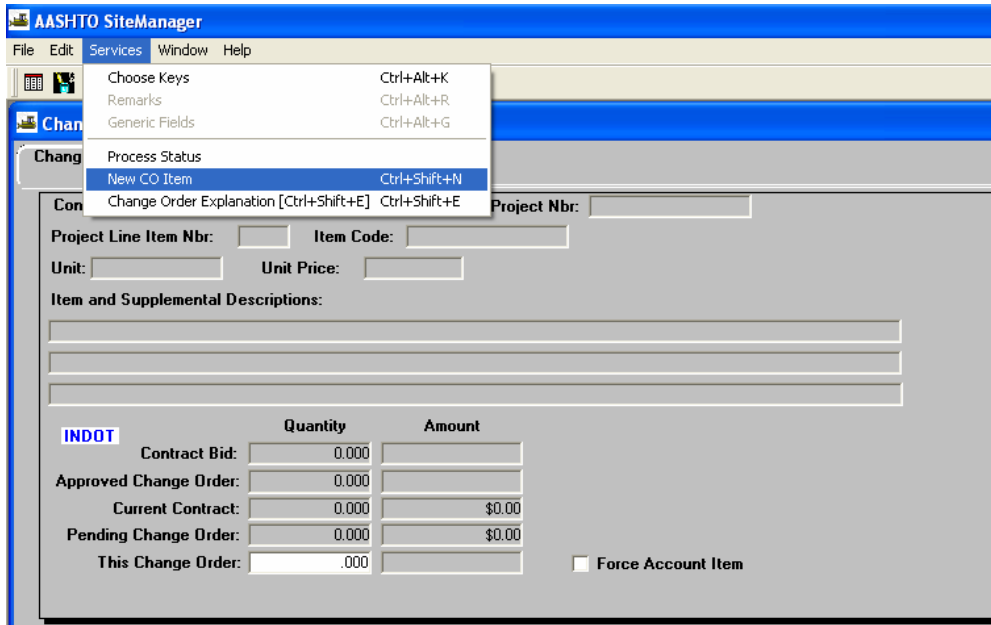
“Click” on **CO Items** located on the toolbar.

The screenshot shows the 'Change Order Items' window in the AASHTO SiteManager application. The window has a 'Change Order Item' tab and a 'New Contract Item' button. The form includes fields for Cont ID (R-90004), CO Nbr (002), Project Nbr, Project Line Item Nbr, Item Code, Unit, and Unit Price. The Item and Supplemental Descriptions section has three empty text boxes. The 'INDOT' logo is displayed. A table shows the following data:

	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	.000	

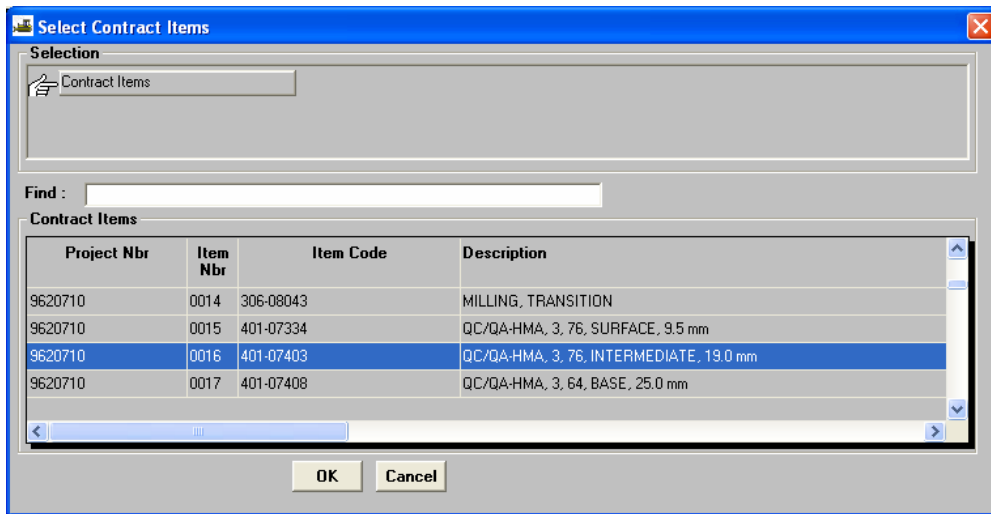
The Force Account Item checkbox is unchecked.

The Change Order Items window opens up.



“Click” on **Services** located on the toolbar

“Click” on **New CO Item** located on the toolbar.



The **Select Contract Items** window opens up. “Double-Click” on the appropriate **Project Nbr** and **Item Nbr**.

	Quantity	Amount
Contract Bid:	1567.000	\$66,597.50
Approved Change Order:	0.000	\$0.00
Current Contract:	1567.000	\$66,597.50
Pending Change Order:	0.000	\$0.00
This Change Order:	200.000	\$0.00

The Change Order Items window opens up with the appropriate Line Item information populated. Verify that the correct item was selected and that all of the information is correct.

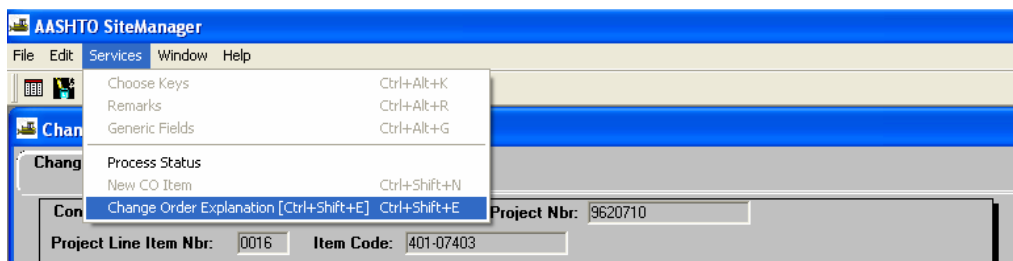
“Enter” the appropriate **This Change Order: Quantity**.

“Click” on **Save**  located on the toolbar.

If another item is to be added to this change order, “Click” on **Services** located on the toolbar

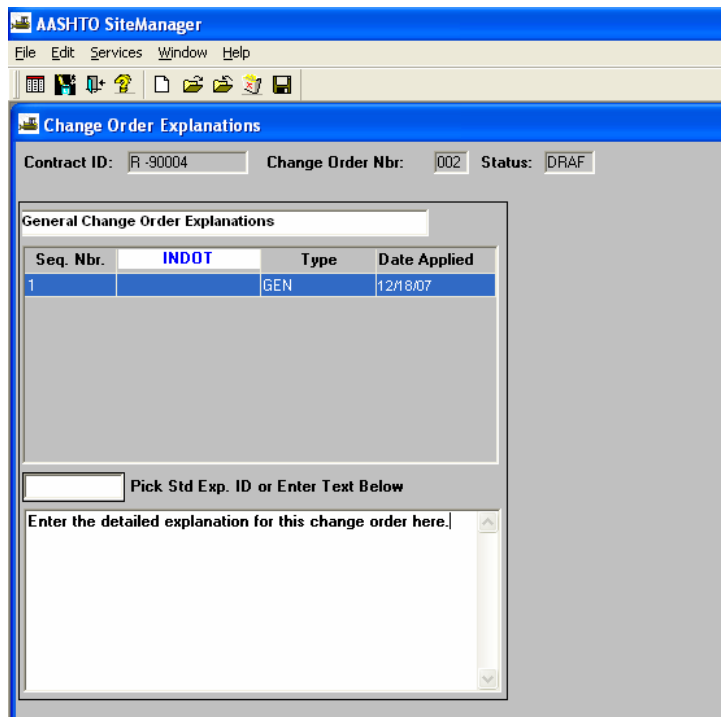
“Click” on **New CO Item** located on the toolbar and then select appropriate item and repeat steps for each item added to the change order.

Then “click” on **Save**  located on the toolbar.




“Click” on **Services** located on the toolbar.

“Click” on **Change Order Explanations** located on the toolbar.





“Click” on **New**  located on the toolbar.

“Enter” a detailed explanation of this change order in the bottom panel.

Additional explanations can be entered for the change order by “Clicking” on **New**  and adding additional explanations.

“Click” on **Save**  located on the toolbar.

“Click” on the **Close**  located on the toolbar.

“Click” on the **Close**  located on the toolbar again, this should bring you back to the **Header**,

AASHTO SiteManager

File Services Window Help

- Choose Keys Ctrl+Alt+K
- Generic Fields Ctrl+Alt+G
- Attachments
- Process Status
- Calculate Change Order Ctrl+Shift+C**
- Forward To... Ctrl+Shift+F
- CO Items Ctrl+Shift+I
- CO Time Adjustments Ctrl+Shift+M
- Change Order Tracking Ctrl+Shift+T

Contract ID: R-90004 CO Number: 002 Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/16/07

Status: Approval Level: Area Engineer

Description: Enter a Short Description of the Change Order

Reason Code:

CO Type:

☒ Emergency Work

Functions: ☒ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☐ Time Adjustment ☐ Final Quantity


Bid Contract Amt: \$658,493.35
Current Contract Amt: \$658,493.35
CO Amount: \$8,500.00

Reference to: Dispute: **INDOT**

“Click” on Services located on the toolbar.

“Click” on Calculate Change Order.

The CO Amount field will then automatically be filled out with the total amount for this change order.

Verify that all of the information is correct, then “click” on **Save**  located on the toolbar.

Forwarding a Change Order for Review

While a Change Order is still in the Draft Status it can be reviewed by others. It will not be approved or denied, but simply reviewed.

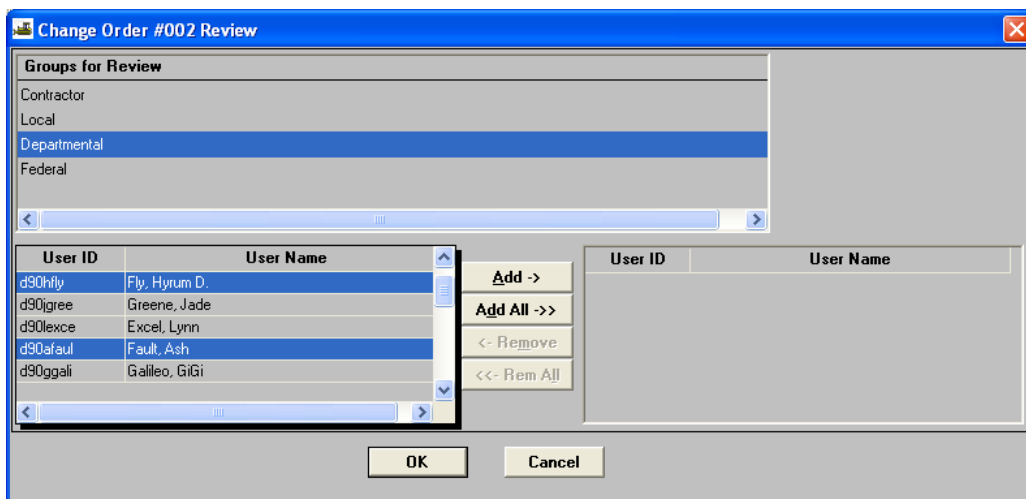
The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and the 'Forward To...' option is highlighted. The main form displays the following information:

- Contract ID: R-90004
- CO Number: 002
- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- CO Created by: Clipper, Buzz
- On: 12/16/07
- Status: Draft (selected)
- Approval Level: Area Engineer
- Description: Enter a Short Description of the Change Order
- Reason Code: ERRORS & OMISSIONS, Design Related
- CO Type: CHANGE ORDER
- Emergency Work: ☒ Emergency Work
- Functions: ☒ Overrun/Underrun, ☐ Force Account, ☐ Extra Work, ☐ Zero Dollar, ☐ Time Adjustment, ☐ Final Quantity
- Bid Contract Amt: \$658,493.35
- Current Contract Amt: \$658,493.35
- CO Amount: \$8,500.00
- Reference to: Dispute:
- INDOT

While viewing the **Header**.

“Click” on **Services** located on the toolbar.

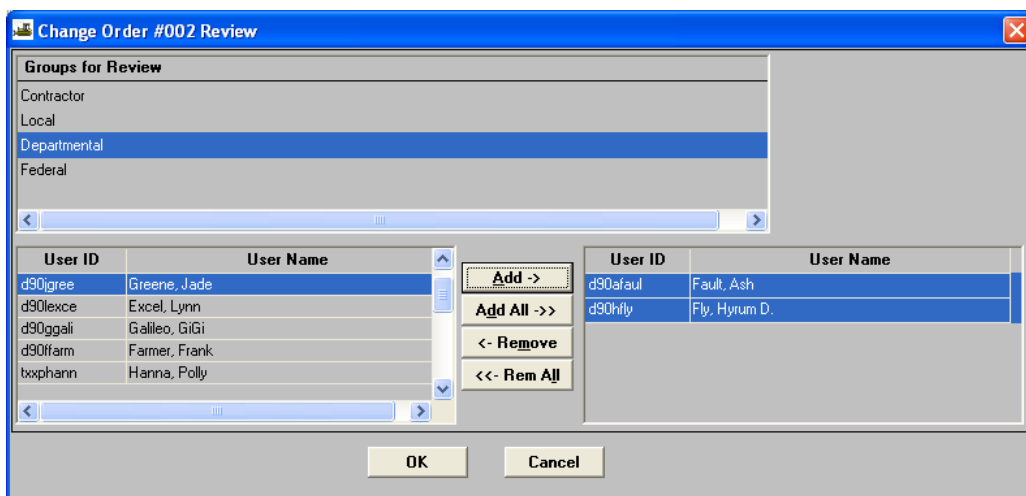
“Click” on **Forward To...**



“Click” on the appropriate **Groups for Review**

“Click” on the appropriate **User ID** from each **Groups for Review**.

Then “Click” on **Add**.



Then “click” on **OK**.

“Click” on Save  located on the toolbar.



This message will appear when the e-mail(s) have been sent to the SiteManager Inbox of the reviewer(s).

Forwarding the Change Order for Approval

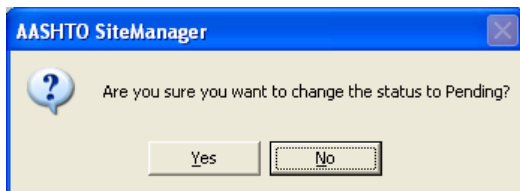
The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". The menu bar includes "File", "Services", "Window", and "Help". The toolbar contains icons for file operations and a "FIELDS" button. The main window is titled "Header" and contains a form for Change Order details. The form fields are as follows:

Contract ID: R-90004	CO Number: 002	Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00	
CO Created by: Clipper, Buzz		On: 12/16/07	
Status: Pending	Approval Level: Area Engineer		
Description: Draft	Description of the Change Order		
Reason: Pending	Reason: OMISSIONS, Design Related		
CO: ORDER	CO: ORDER		
<input checked="" type="checkbox"/> Emergency Work		Bid Contract Amt: \$658,493.35	
Function: n/Underrun <input type="checkbox"/> Force Account <input type="checkbox"/> Extra Work <input type="checkbox"/> Zero Dollar <input type="checkbox"/> Time Adjustment <input type="checkbox"/> Final Quantity		Current Contract Amt: \$658,493.35	
Reference to: Dispute:		CO Amount: \$8,500.00	

At the bottom of the form, there is a blue button labeled "INDOT".

From the Change Order **Header** change the Status from **Draft** to **Pending**.

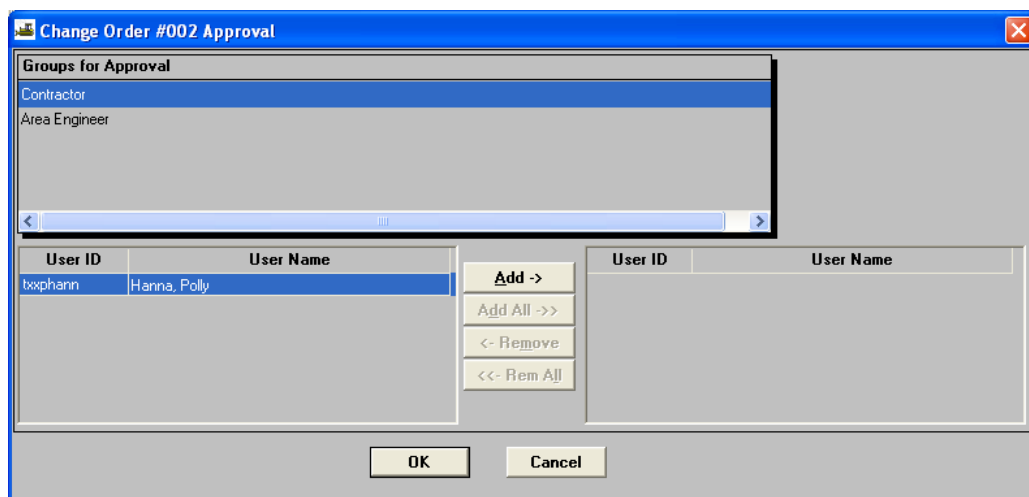
“Click” on **Save**  located on the toolbar.



“Click” on Yes.

The **Change Order Approval: Groups for Approval** window will open.

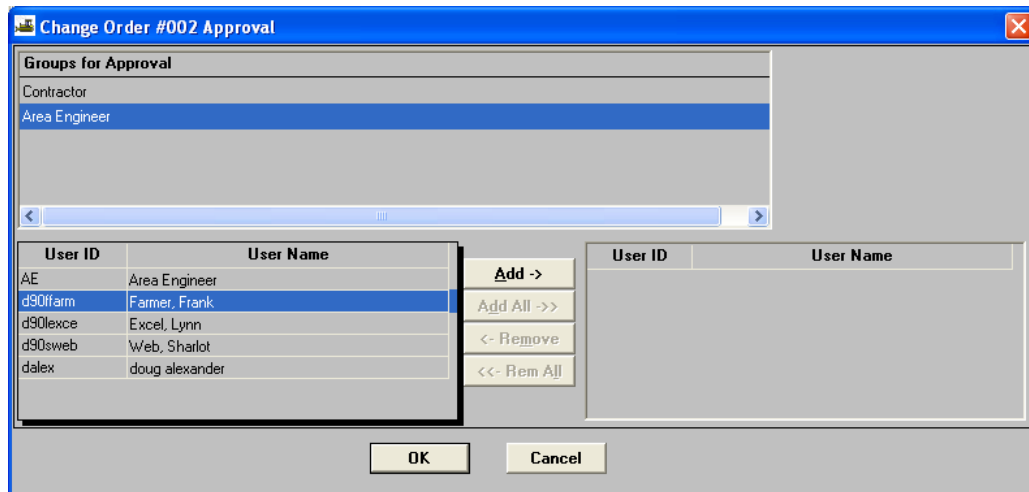
“Click” on the appropriate **User Id** for each **Groups for Approval**.



Note: You will want to pick yourself as the Contractor until the contractors come online with SiteManager. Once the Contractor signs the Change Order you will have to log on as the Contractor and approve the Change Order.

“Click” on the appropriate **User Id** for each **Groups for Approval**.

“Click” on the **Add** button, then select **Groups for Approval: Area Engineer**



“Select” the appropriate **Area Engineer** then “Click” on **Add**.

After all Groups for Approval have been selected, “click” on OK.



This message will appear after the e-mail is sent to the first **User ID** that needs to approve this Change Order. “Click” on **OK**.

Approving or Rejecting a Change Order

This section will explain how to approve or reject a change order.

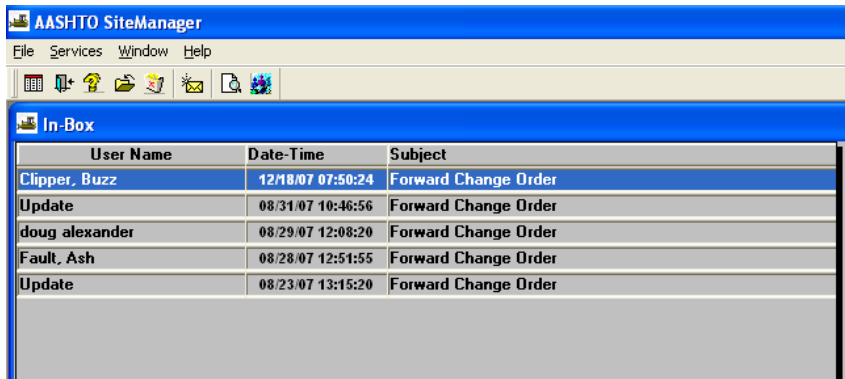
The Contractor and Local Public Agency (LPA) will sign the printed change order document when they approve it. After the PE/S received the signed document, the PE/S will enter the approval status of the change order into SiteManager. The approval sequence that the PE/s will enter into SiteManager is in this order:

1. Contractor
2. LPA

If additional users are required to approve the change order, then SiteManager will automatically process the change order to the next approver (i.e. AE, DCE...).

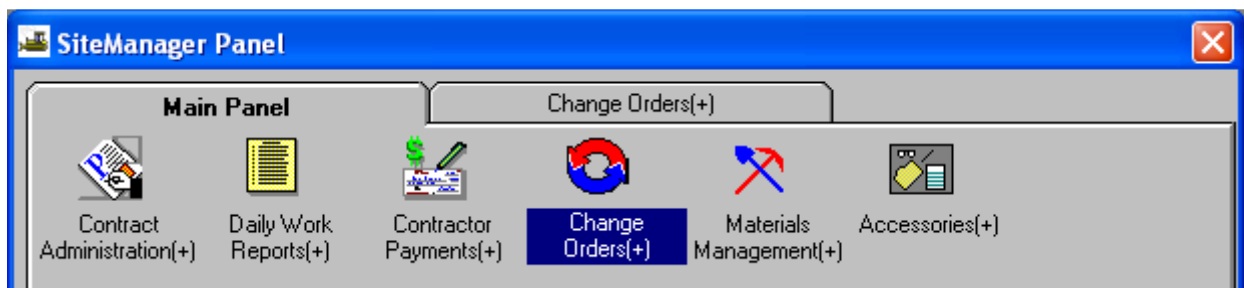
NOTE: Each PE/S will have a Contractor and a LPA user group associated to them. Log into the appropriate User Group corresponding with the required approval level.

For this exercise log into SiteManager as Contractor: txxphann, password: pass



This message will be sent to your In-Box when the change order can be approved or rejected. Refer to module G-1: SiteManager INBOX for viewing the message.

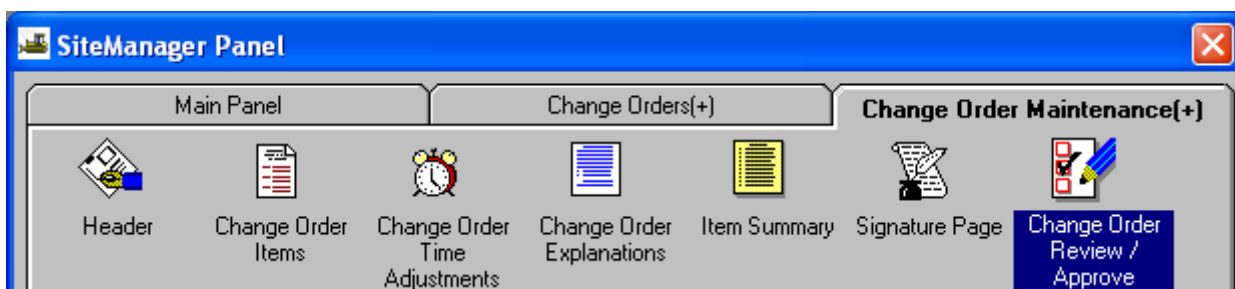
To navigate to the Change Order window:



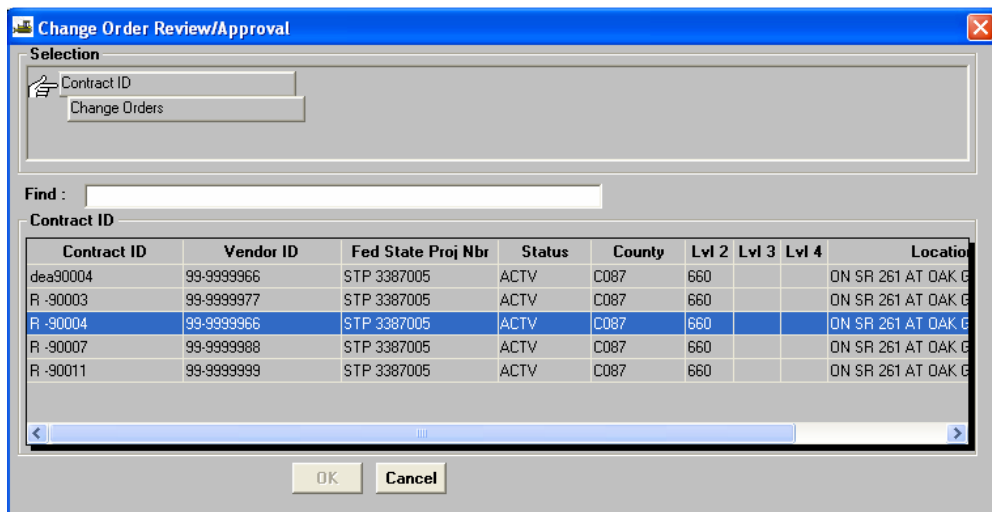
“Double-Click” on **Change Orders(+)**.



“Double-click” on **Change Order Maintenance(+)**.

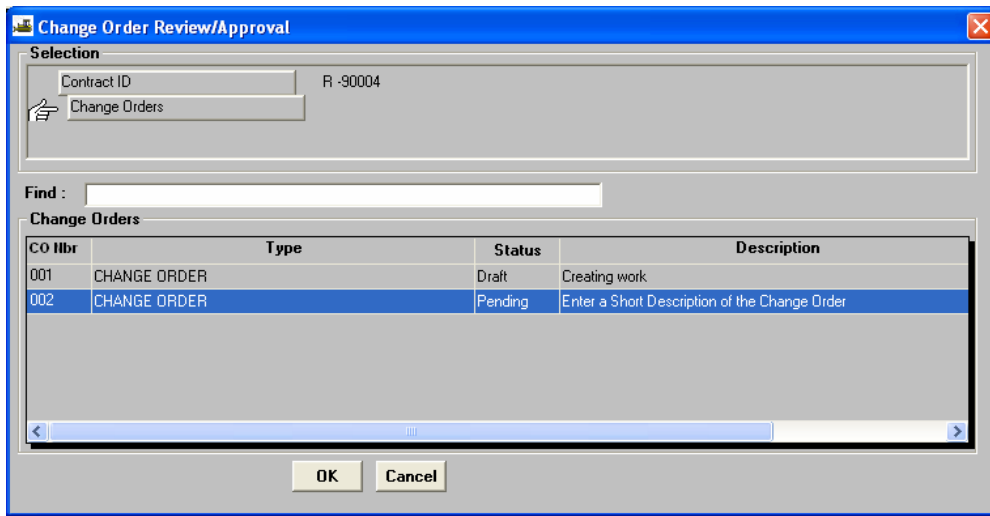


“Double-click” on **Change Order Review/Approve**.

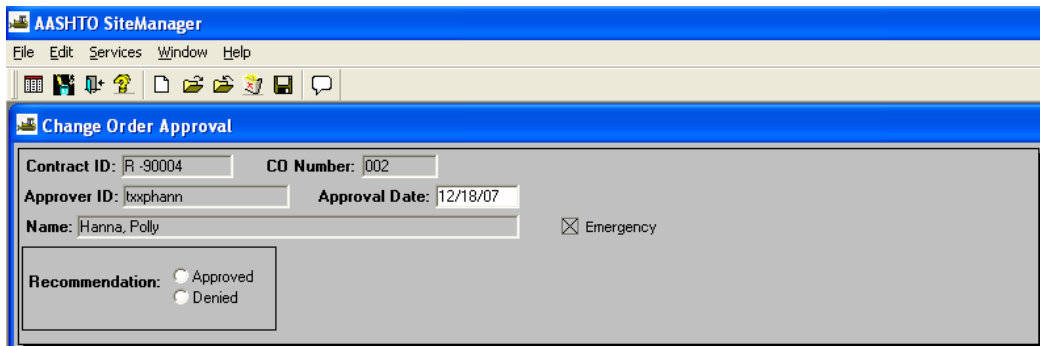


The **Change Order Review/Approval** panel will appear.

“Double-click” on the appropriate **Contract ID**.




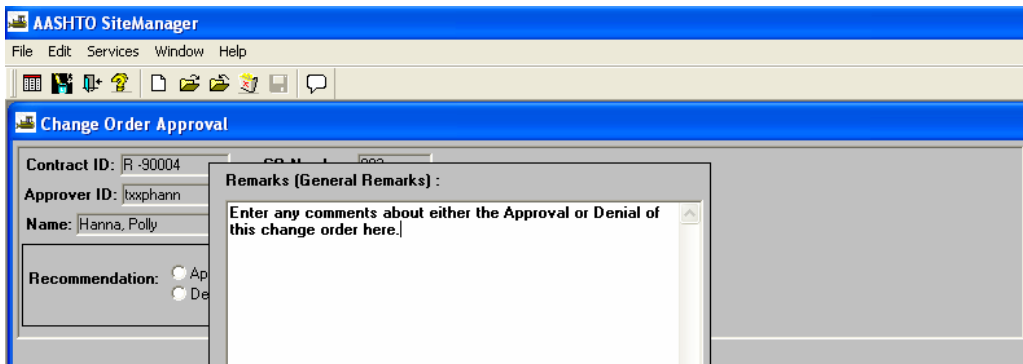
“Double-click” on the appropriate **CO Nbr**.



The **Change Order Approval** window opens showing the following information:

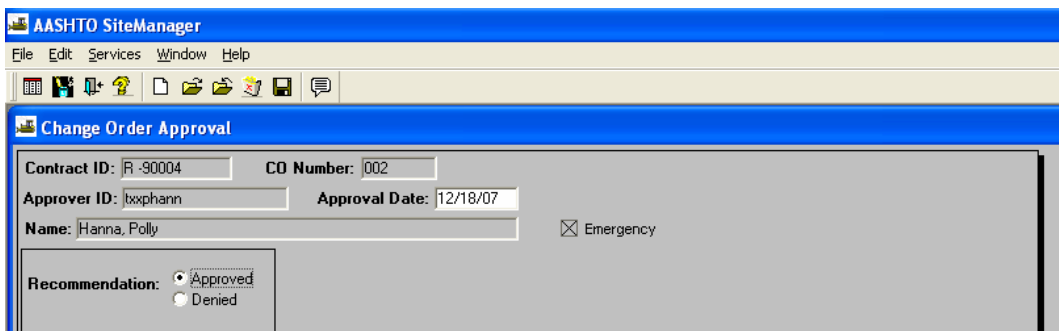
- **Contract ID:** The **Contract ID** is the unique identifier for the contract and is automatically populated.
- **CO Number:** The **CO Number** is the unique identifier for the Change Order and is automatically populated.
- **Approver ID:** The **Approver ID** is the SiteManager user name of the individual who is approving the Change Order.
- **Approval Date:** The **Approval Date** field is automatically populated with the current date.
- **Name:** The **Name** field is the user associated to the **Approver ID**.
- **Emergency:** This field is checked when the Change Order involves work needing quick approval.
- **Recommendation:** This field is populated with either Approved or Denied.


Comments about the change order can be made by “Clicking” on the **Remarks**  button located on the toolbar.

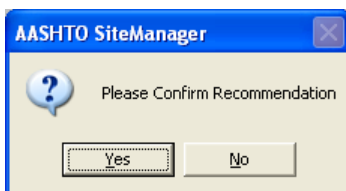


“Enter” the comments in the **Remarks** field.

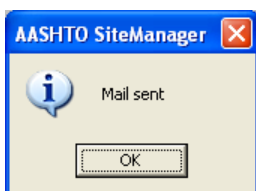
Close this box by “clicking” on the **Remarks**  button again. Notice that the **Remarks**  balloon button now has lines in it showing comments are located there.



“Click” on the appropriate button for either **Approved** or **Denied**.
 “Click” on the **Save**  button located on the toolbar.



“Click” the appropriate response to this message.



“Click” on the **OK** button. The next User in the approval cycle for the change order will receive a SiteManager Inbox message indicating they have a change order for approval.

“Click” on the **Close**  button located on the toolbar.

Creating a Overrun/Underrun Change Order

Exercise E-1-0-T

Group Exercise

Log into SiteManager as: d90bclip

Enter password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Orders (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Header** icon

“Click” on **Services** located on the Toolbar

“Click” on **Choose Keys**

“Double-Click” on appropriate **Contract ID: R90007**

Enter **Description**: Removal of unsuitable material in commercial driveway

Select **Reason Code**: CONSTRUCTABILITY, Soils Related

Select **CO Type**: CHANGE ORDER

Select **Functions**: Overrun/Underrun

“Click” on **Save** located on the Toolbar

“Click” on **Services** located on the toolbar, then “Click” on **New CO Item**.

Select on Item Code: 105-07039 Field Office, B

“Click” on **Save** located on the Toolbar.

“Click” on **Services** located on the toolbar, then “Click” on **Change Order Explanations**.

Enter an explanation for this change order.

“Click” on **Save** located on the Toolbar

Return to the **Header**

“Click” on **Services** located on the Toolbar, then “Click” on **Calculate Change Order**.

Change **Status** to **Pending**.

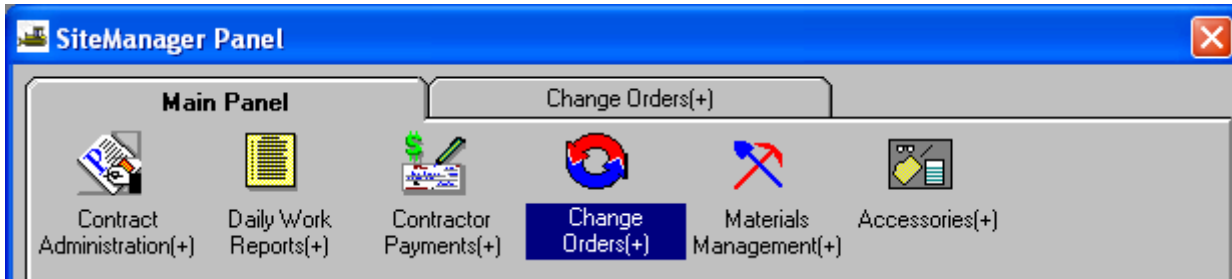
“Click” on **Save** located on the Toolbar

“Add” the User ID’s for each User Group for Approval.

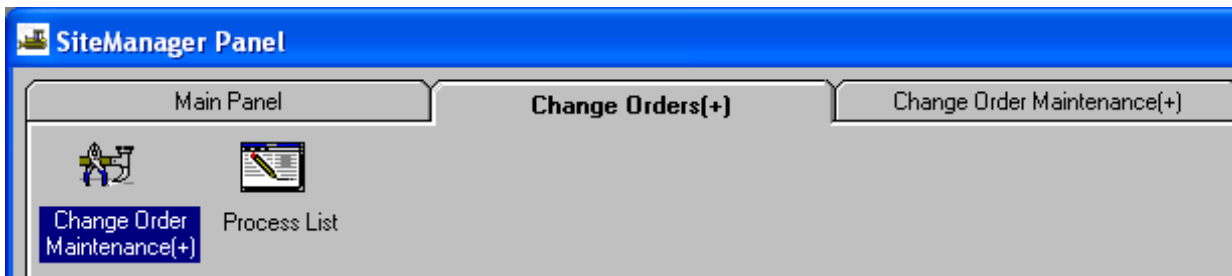
“Click” on **Save** located on the Toolbar

“Click” on **Close** located on the Toolbar

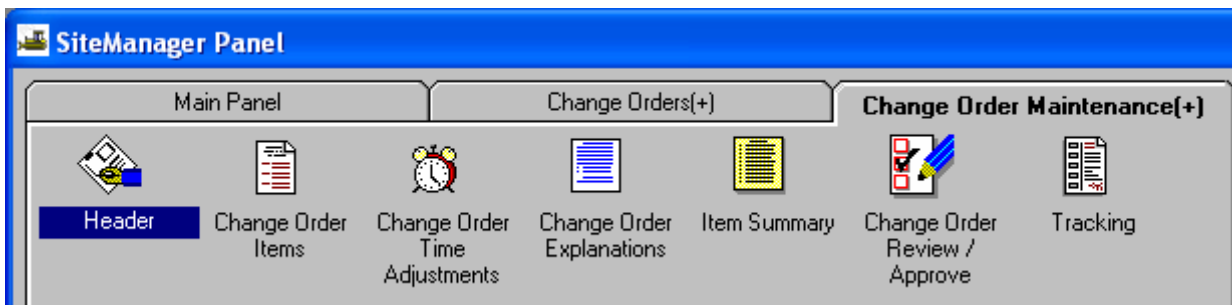
Creating an Extra Work Change Order



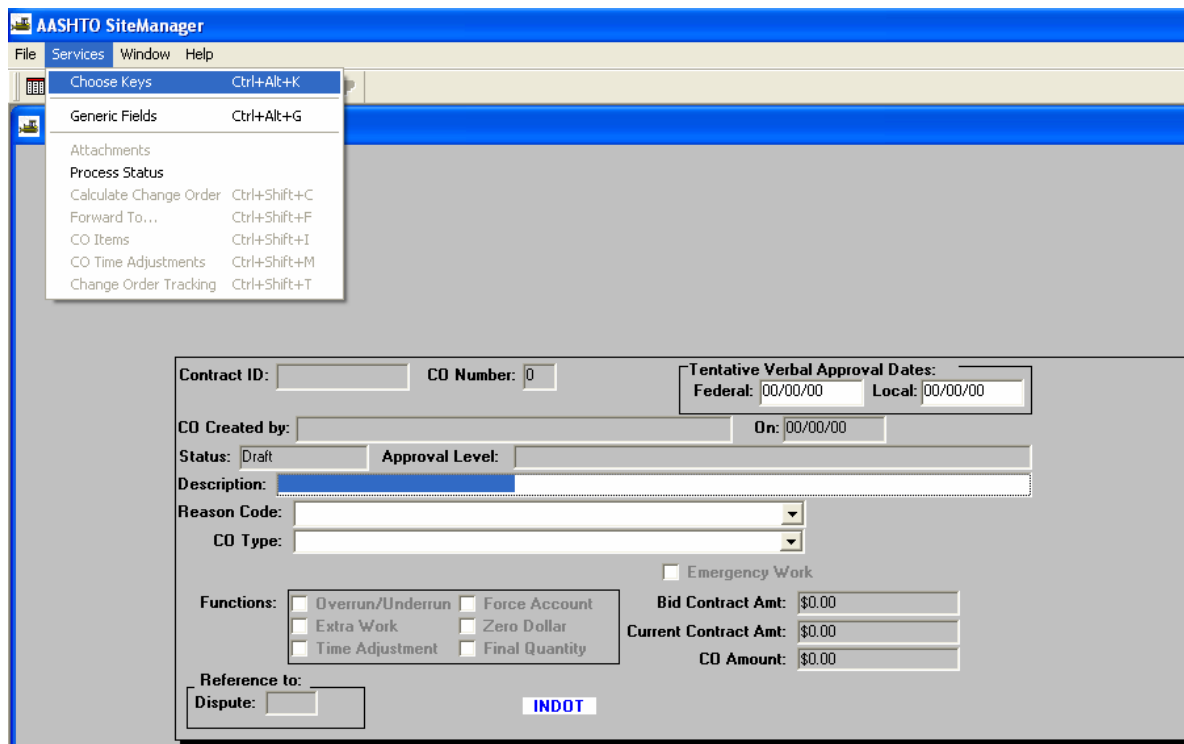
“Double-click” on **Change Order(+)**.



“Double-click” on **Change Order Maintenance(+)**.



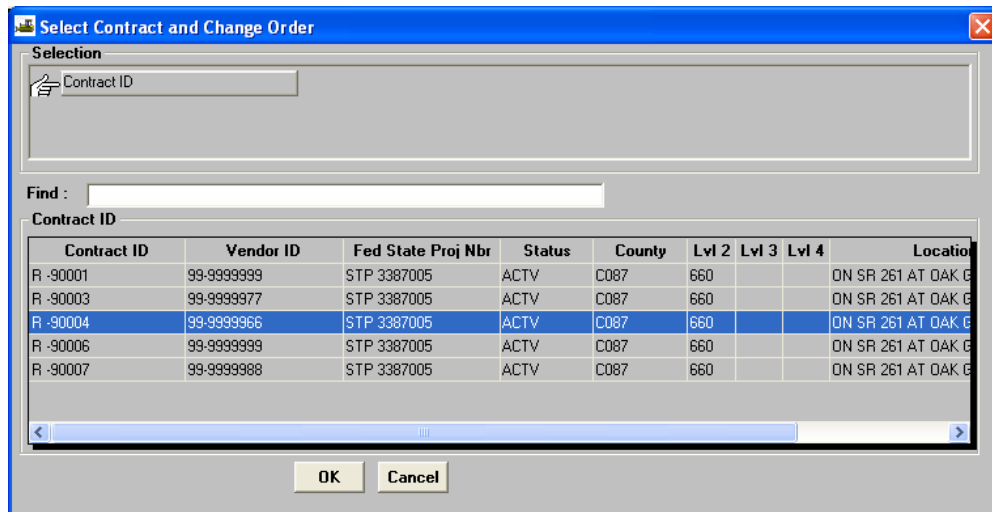
“Double-click” on **Header**.



The **Header** window will open up.

“Click” on **Services** located on the toolbar.

“Click” on **Choose Keys**.



“Double-Click” on the appropriate **Contact ID**.

AASHTO SiteManager

File Services Window Help

Header

Contract ID: R-90004 CO Number: 003 Tentative Verbal Approval Dates:
Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/18/07

Status: Draft Approval Level:

Description: Enter a short description of the change order here.

Reason Code: CONSTRUCTABILITY, Soils Related

CO Type: CHANGE ORDER

☐ Emergency Work

Functions: ☐ Overrun/Underrun ☐ Force Account ☒ Extra Work ☐ Zero Dollar
☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35
Current Contract Amt: \$658,493.35
CO Amount: \$0.00

Reference to:
Dispute: [INDOT](#)

Description: “Enter” a short general description for the entire change order.

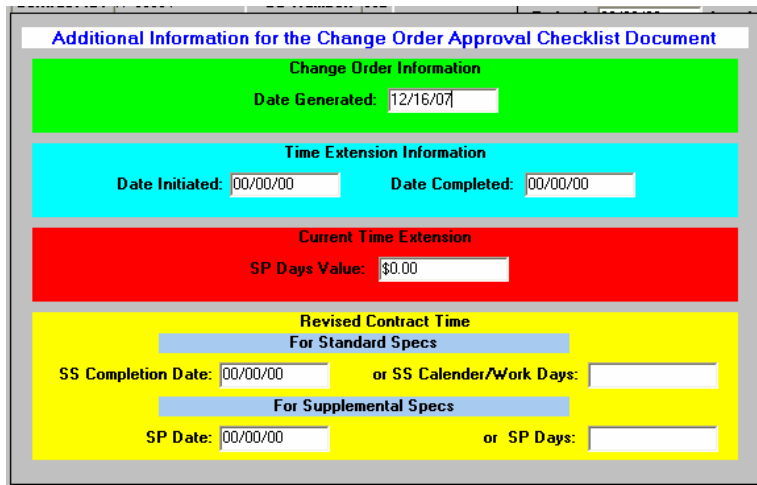
Reason Code: “Click” on the appropriate **Reason Code** for the entire order.

CO Type: “Click” on the appropriate **CO Type**.

“Click” on **Functions: Extra Work**

If this change order is referenced to a Dispute or Claim, “Right-click” on the **Dispute** Field and select the appropriate **Dispute/Claim**.

“Click” on the Generic Field  located on the toolbar.




The screenshot shows a form titled "Additional Information for the Change Order Approval Checklist Document". It is divided into several colored sections: a green section for "Change Order Information" with a "Date Generated" field containing "12/16/07"; a cyan section for "Time Extension Information" with "Date Initiated" and "Date Completed" fields, both set to "00/00/00"; a red section for "Current Time Extension" with an "SP Days Value" field set to "\$0.00"; and a yellow section for "Revised Contract Time" which includes sub-sections for "For Standard Specs" and "For Supplemental Specs", each with "SS Completion Date" and "SP Date" fields set to "00/00/00".

Additional Information for the Change Order Approval Checklist Document opens up. “Enter” the appropriate **Date Generated** for the Change Order.

To close “Click” on the Generic Field  located on the toolbar.

“Click” the **Save**  button located on the toolbar.

Documents can be added to the change order Header by using the **Attachments**  button.

Refer to **A-2-11-2 Attaching a Document** for further information on attaching a document to this change order

“Click” on **Save**  located on the toolbar.



“Click” on **Services** located on the toolbar.

“Click” on **CO Items** located on the toolbar.

Creating New Change Order Items

AASHTO SiteManager
File Edit Services Window Help

Change Order Items

Change Order Item New Contract Item

Contract ID: R-90004 CO Nbr: 003 Project Nbr:

Project Line Item Nbr: Item Code:

Unit: Unit Price:

Item and Supplemental Descriptions:

INDOT	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	1.000	

☐ Force Account Item

The **Change Order Items** window opens up. “Click” on the **New Contract Item** Tab.

AASHTO SiteManager
File Edit Services Window Help

Change Order Items

Change Order Item **New Contract Item**

Contract ID: R-90004 Change Order Nbr: 003

Project Nbr: 9620710 Category Nbr: Project Line Nbr:

Project Nbr	Fed St Project Nbr
9620710	3387005
982071A	3387005

Item Code: Spec Year:

Description:

Major Item:

Contract Line Nbr: Material Discrepancy Adj: ☐

Supplemental Descriptions:

INDOT

Project Nbr: Select the appropriate **Project Number** from the drop down list.

AASHTO SiteManager
File Edit Services Window Help

Change Order Items
Change Order Item New Contract Item

Contract ID: R-90004 Change Order Nbr: 003

Project Nbr: 9620710 Category Nbr: 0001 Project Line Nbr:
 Item Code: Units Type:
 Description:
 Major Item: ☐ Unit Price: \$0.00000
 Contract Line Nbr: Pay Plan Qty:
 Supplemental Descriptions:
 INDOT

Category Number	Description1
0001	INTERSECTION IMPROVEMENT

Category Nbr: Select the appropriate **Category Number** from the drop down list.

AASHTO SiteManager
File Edit Services Window Help

Change Order Items
Change Order Item New Contract Item

Contract ID: R-90004 Change Order Nbr: 003

Project Nbr: 9620710 Category Nbr: 0001 Project Line Nbr: 0151
 Item Code: Units Type: Spec Year:
 Description:
 Major Item: ☐ Unit Price: \$0.00000
 Contract Line Nbr: Pay Plan Qty: Suppl Desc Req'd: Material Discrepancy Adj:
 Supplemental Descriptions:
 INDOT

Project Line Nbr: Enter the next **Project Line Number**.

To find the next **Project Line Number**, view report Item File (PLN sort) on the SiteManager Report website. For instruction on viewing the SiteManager report website view module H-1: SiteManager Reports.

“Enter” the appropriate **Project Line Nbr**.

Item Code: The **Item Code** field is a searchable field. “Right-click” on the field and search for the appropriate **Item Code**.

Item Code	Spec Year	Short Description	Unit
207-08265	1995	SUBGRADE TREATMENT, TYPE IIA	m2
207-08266	1995	SUBGRADE TREATMENT, TYPE III	m2
207-08267	1995	SUBGRADE TREATMENT, TYPE IIIA	m2
207-08268	1995	SUBGRADE TREATMENT, TYPE IV	m2
215-06458	1995	SUBGRADE, MODIFIED	m3
622-05401	1995	SUBMERGED AQUATICS-SA	EACH
210-05829	1995	SUBMERSIBLE FUEL PUMP	EACH
621-08223	1995	SUBSTRATE SOIL	m3

“Double-click” on the appropriate **Item Code**.

The **Item Code** field will then be populated with the appropriate number.

Unit Type: This field will be automatically populated based on the **Item Code** selected.

Spec Year: This field will be automatically populated based on the **Item Code** selected.

Description: This field will be automatically populated based on the **Item Code** selected.

Major Item: This field will be checked if this item is a Major Item based on spec. reference 101.30.

Unit Price: “Enter” the appropriate **Unit Price** for this item.

Contract Line Nbr: Enter the next **Contract Line Number**.

To find the next **Contract Line Number**, view report Item File (CLN sort) on the SiteManager Report website. For instruction on viewing the SiteManager report website view module H-1: SiteManager Reports.

“Enter” the appropriate **Contract Line Nbr**.

Pay Plan Qty: When the item can be paid based on plan quantity then this box will be checked.

Supplemental Descriptions: These fields will be filled in when additional information is to be entered in for the description of the item.

Once this information is filled in “click” on the **Change Order Item** tab.

AASHTO SiteManager

File Edit Services Window Help

Change Order Items

Change Order Item New Contract Item

Cont ID: R-90004 CO Nbr: 003 Project Nbr: 9620710

Project Line Item Nbr: 0151 Item Code: 215-06458

Unit: Cubic Meter (m³) Unit Price: \$524.99000


Item and Supplemental Descriptions:

SUBGRADE, MODIFIED


	Quantity	Amount
Contract Bid:	0.000	\$0.00
Approved Change Order:	0.000	\$0.00
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	250.000	\$131,247.50


☐ Force Account Item

This Change Order Quantity: The **This Change Order Quantity** is the quantity of extra work for this item. “Enter” the appropriate amount in this field.

“Click” on the Save  button located on the toolbar. The **This Change Order Amount** will be automatically filled in.

Force Account Item: The **Force Account Item** checkbox will be check if this item is associated to a force account.

If additional items are needed “click” on the **New**  button located on the toolbar and repeat these steps.

After all of the items are added to this change order “click” on the Save  button located on the toolbar, then follow the steps for adding **Change Order Explanations**, **Forwarding for Review**, and **Fowarding the Change Order for Approval** starting on Page 14 of this document.

Change Order Extra Work Items

Exercise E-2-1-T Group Exercise

This exercise will demonstrate how to establish an Extra Work Change Order Item.

Log into SiteManager as: d90bclip

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Order (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Change Order Items** icon

“Click” on **Services** located on the Toolbar

“Click” on **Choose Keys**

“Double-Click” on the appropriate **Contract ID**: 90007

“Double-Click” on the appropriate **CO Nbr**: 3

“Click” on the **New Contract Item** Tab

Select **Project Nbr**: 9620710

Select **Category Nbr**: 0001

Enter **Item Nbr**: 0090

Enter **Item Code**: 205-06932 Spec Year 1995 (using Search function)

Enter **Unit Price**: \$8.50

Enter **Proposal Line Nbr**: 0090

“Click” on the **Change Order Item** Tab

Enter **Change Order Item Description**: “Additional Work required to improve Constructability”

Enter **Quantity** 16.0 m

Enter **This Change Order**: 1

“Click” on **Save** located on the Toolbar

“Click” on **Close** located on the Toolbar

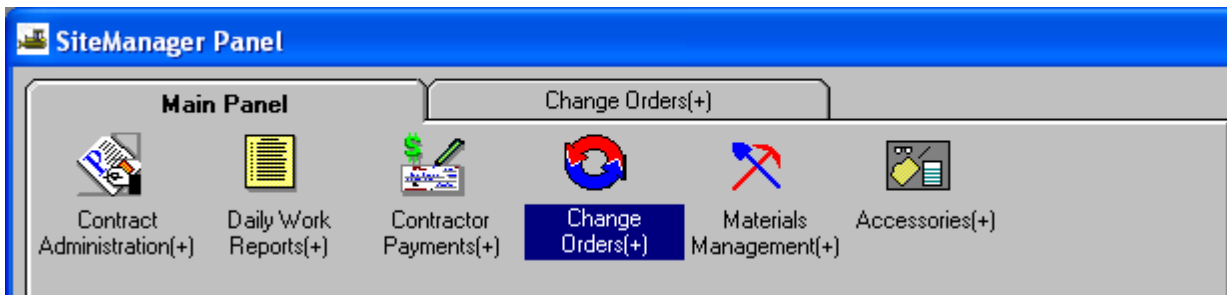
CHANGE ORDER for TIME ADJUSTMENTS

This section will explain how to add time adjustments to a contract or milestone through a change order.

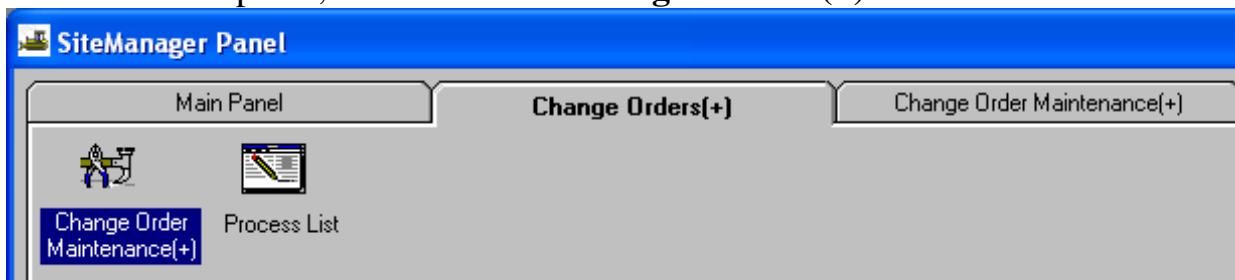
NOTE: A header must be created and the Time Adjustment Function check-box, located in the header, must be checked.

There are three types of time adjustments:

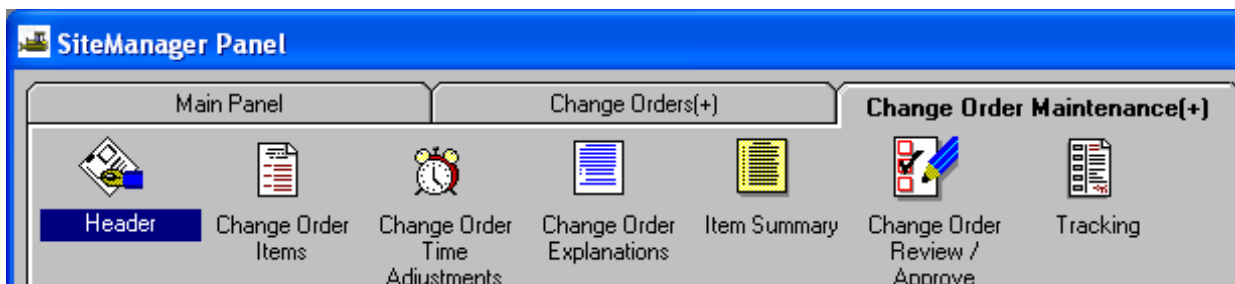
- Change in the Contract Completion Date-available only for Contracts with a Fixed Completion Date.
- Change in the number of days associated with a Contract-available for Contracts with a Work Day or Calendar Day completion.
- Change in the number of days associated with a Milestone-available for Contracts with a Work Days, Calendar Day, or Fixed Completion Date.



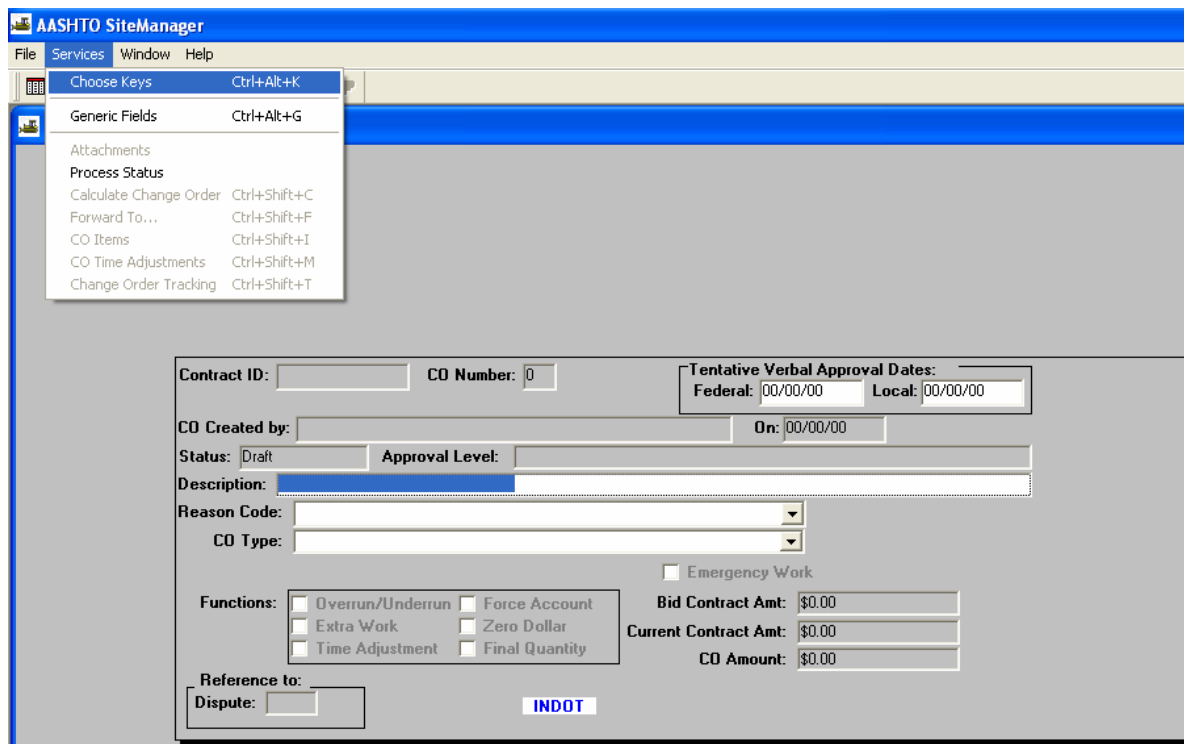
From the main panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**.



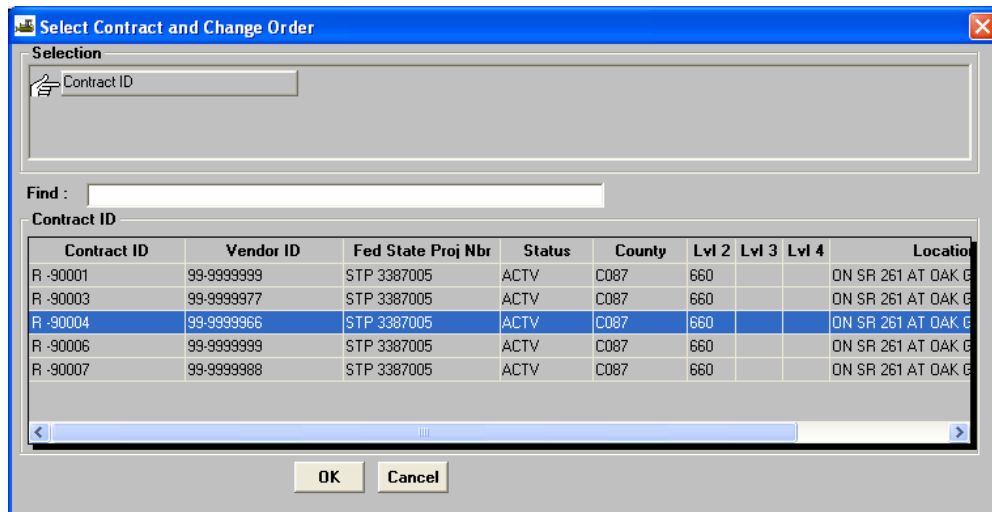
“Double-click” on **Header**.



The **Header** window will open up.

“Click” on **Services** located on the toolbar.

“Click” on **Choose Keys**.



AASHTO SiteManager

File Services Window Help

Header

Contract ID: R-90004 CO Number: 004 Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/18/07

Status: Draft Approval Level:

Description: Enter a short general description for this change order.

Reason Code: CONSTRUCTABILITY, Utilities Related

CO Type: TIME EXTENTION AGREEMENT

Emergency Work

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☒ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35

Current Contract Amt: \$658,493.35

CO Amount: \$0.00

Reference to: Dispute: 0 **INDOT**

Description: “Enter” a short general description for the entire change order.

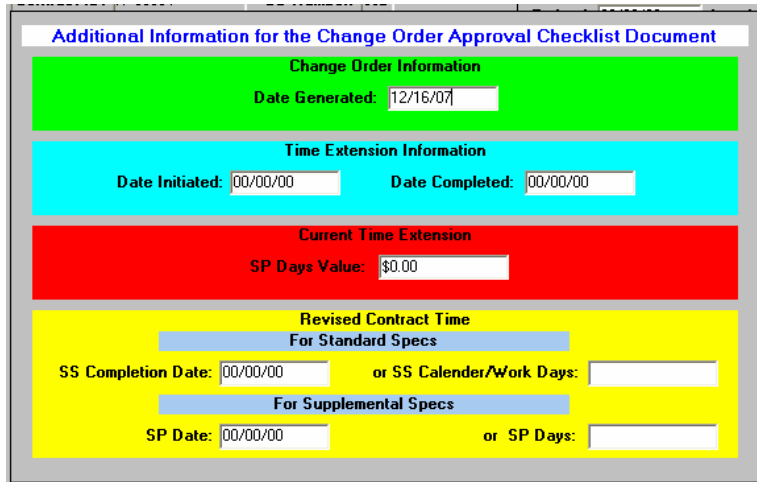
Reason Code: “Click” on the appropriate **Reason Code** for the entire order.

CO Type: “Click” on the appropriate **CO Type**.

“Click” on **Functions: Time Adjustment**

If this change order is referenced to a Dispute or Claim, “Right-click” on the **Dispute** Field and select the appropriate **Dispute/Claim**.

“Click” on the Generic Field  located on the toolbar.



Additional Information for the Change Order Approval Checklist Document

Change Order Information
Date Generated: 12/16/07

Time Extension Information
Date Initiated: 00/00/00 Date Completed: 00/00/00


Current Time Extension
SP Days Value: \$0.00

Revised Contract Time
For Standard Specs
SS Completion Date: 00/00/00 or SS Calender/Work Days:
For Supplemental Specs
SP Date: 00/00/00 or SP Days:

Additional Information for the Change Order Approval Checklist Document opens up. “Enter” the appropriate **Date Generated** for the Change Order.

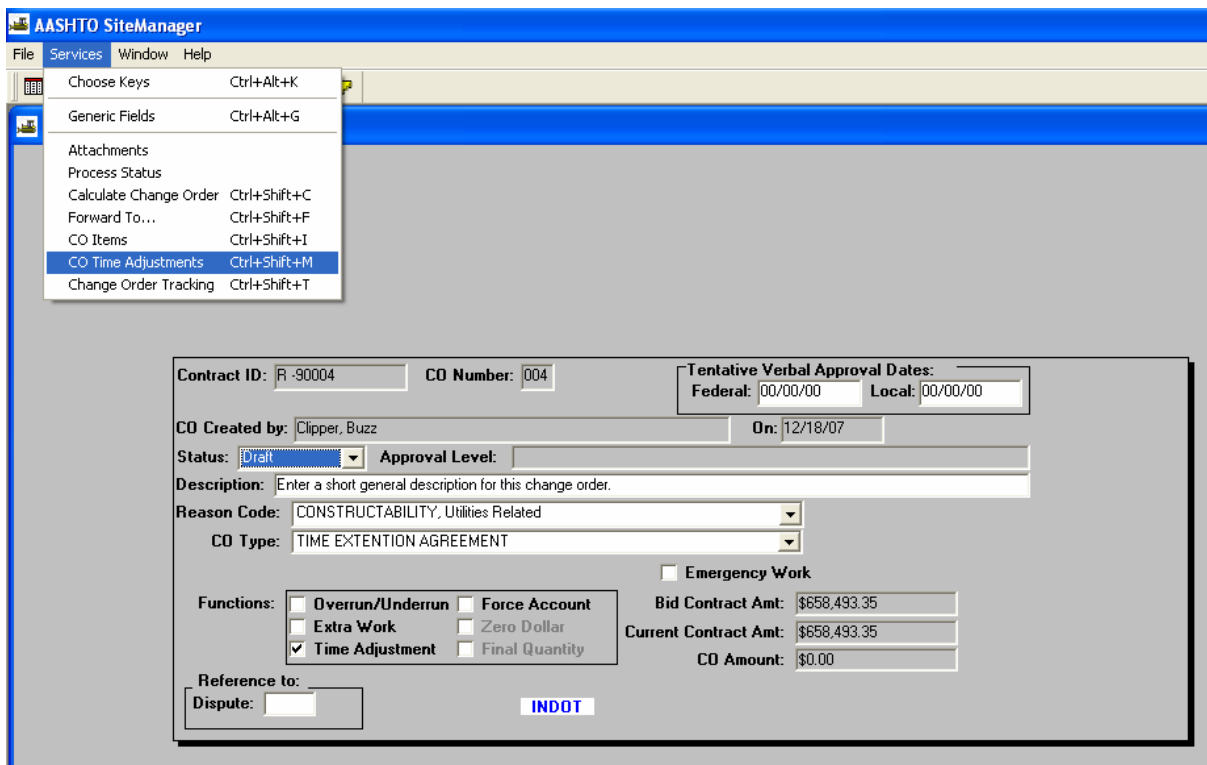
To close “Click” on the Generic Field  located on the toolbar.

“Click” the **Save**  button located on the toolbar.

Documents can be added to the change order Header by using the **Attachments**  button.

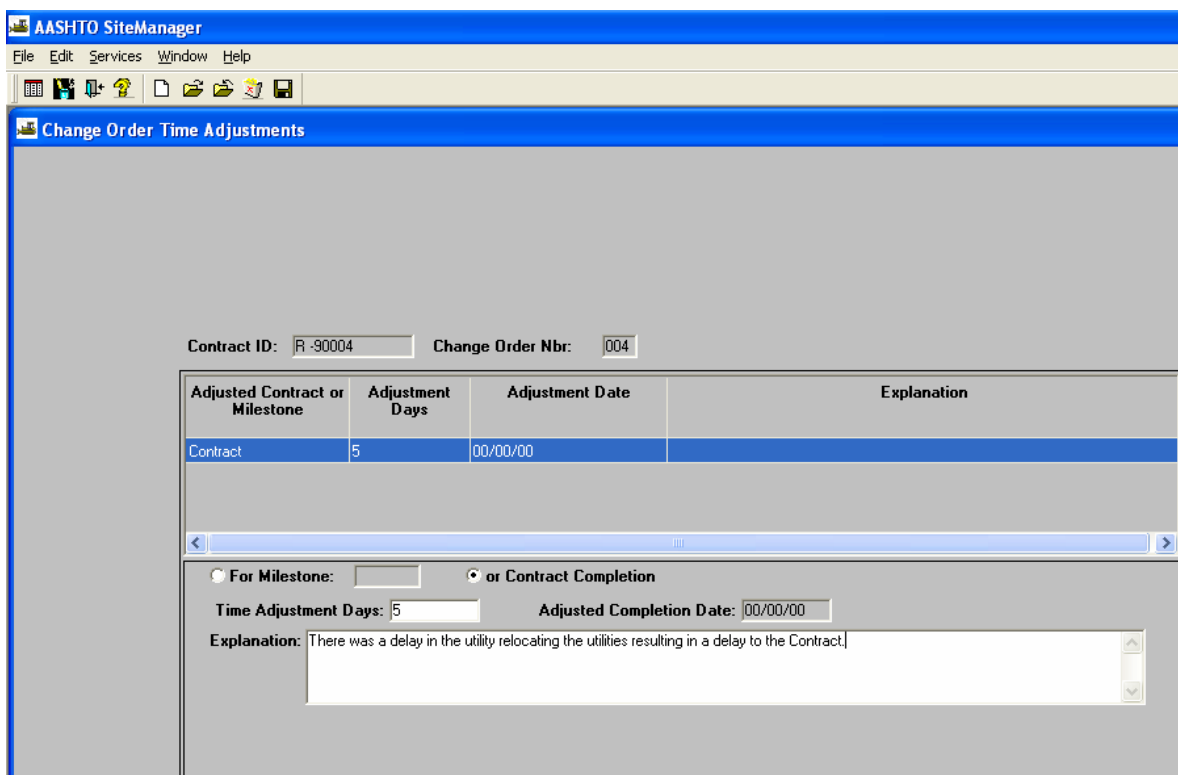
Refer to **A-2-11-2 Attaching a Document** for further information on attaching a document to this change order

“Click” on **Save**  located on the toolbar.



“Click” on **Services** located on the toolbar.

“Click” on **CO Time Adjustments** located on the toolbar.



The **Change Order Time Adjustment** window opens up. By default the window opens up with the radio button selected for **Contract Completion**, if this is for **Milestones** select the **Milestone** radio button.

AASHTO SiteManager

File Edit Services Window Help

Change Order Time Adjustments

Contract ID: R-90004 Change Order Nbr: 004

Adjusted Contract or Milestone	Adjustment Days	Adjustment Date	Explanation
Contract	5	00/00/00	

☐ For Milestone:
☐ or Contract Completion


Time Adjustment Days:
 Adjusted Completion Date:

Explanation: There was a delay in the utility relocating the utilities resulting in a delay to the Contract.


Time Adjustment Days: Enter the appropriate number of days for this **Time Adjustment**.

Explanation: Enter any remarks for this **Time Adjustment** in the **Explanation** field.

“Click” on **Save**  located on the toolbar.

If an additional Time Adjustment is required for the **Milestone**, “click” on the New  button located on the toolbar and enter the required information for the **Milestone**.

Then “click” on **Save**  located on the toolbar.

After all of the **Time Adjustments** are added to this change order “click” on the Save  button located on the toolbar, then follow the steps for adding **Change Order Explanations, Forwarding for Review, and Forwarding the Change Order for Approval** starting on Page 14 of this document.

Change Order Time Adjustments

Exercise E-3-T Group Exercise

This exercise will demonstrate how to prepare a Contract Time Adjustment for a Change Order.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Order (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Change Order Time Adjustments** icon

“Double-Click” on the appropriate **Contract ID**: R90003

“Double-Click” on the appropriate **CO Nbr**: 2

Enter Explanation: “Contract time adjustment due to INDOT interference with subcontract approval”

Enter **Time Adjustment Days**: “10”

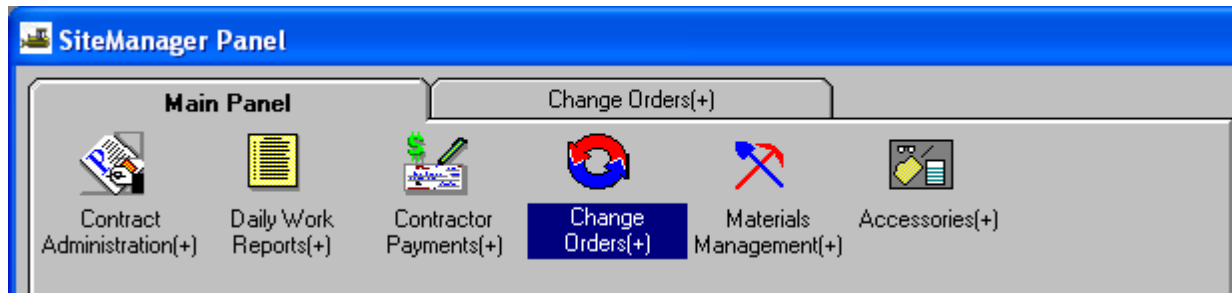
“Click” on **Save** located on the Toolbar

“Click” on **Close** located on the Toolbar

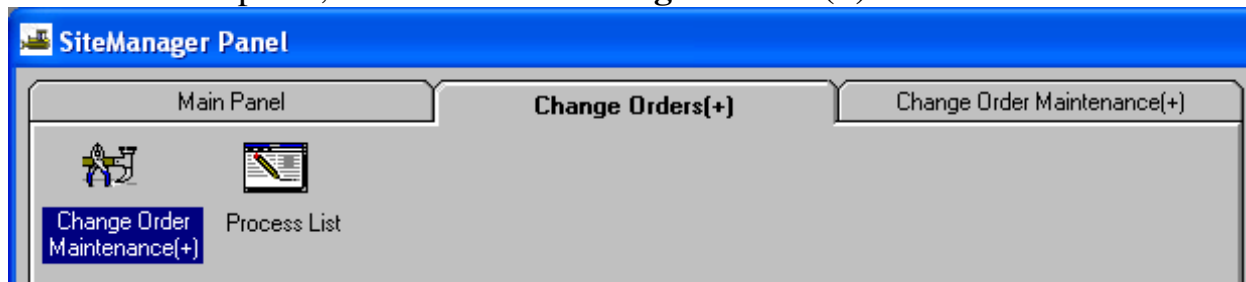
ZERO DOLLAR CHANGE ORDER

This section will explain how to create a Zero Dollar Change Order.

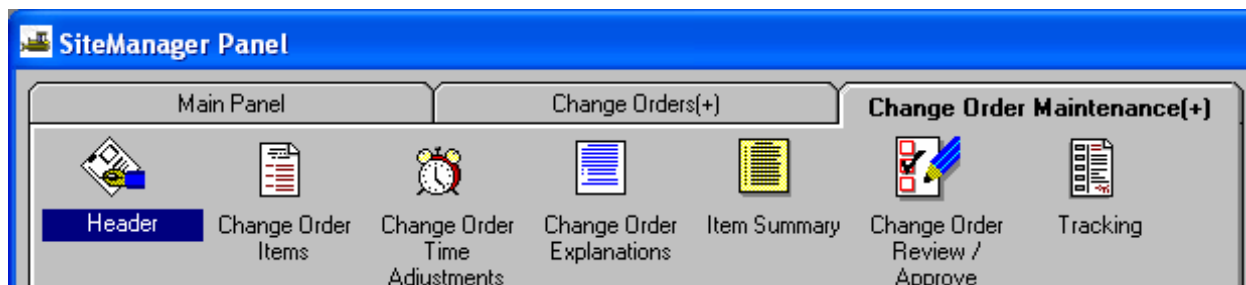
NOTE: A header must be created and the Zero Dollar check-box, located in the header, must be checked.



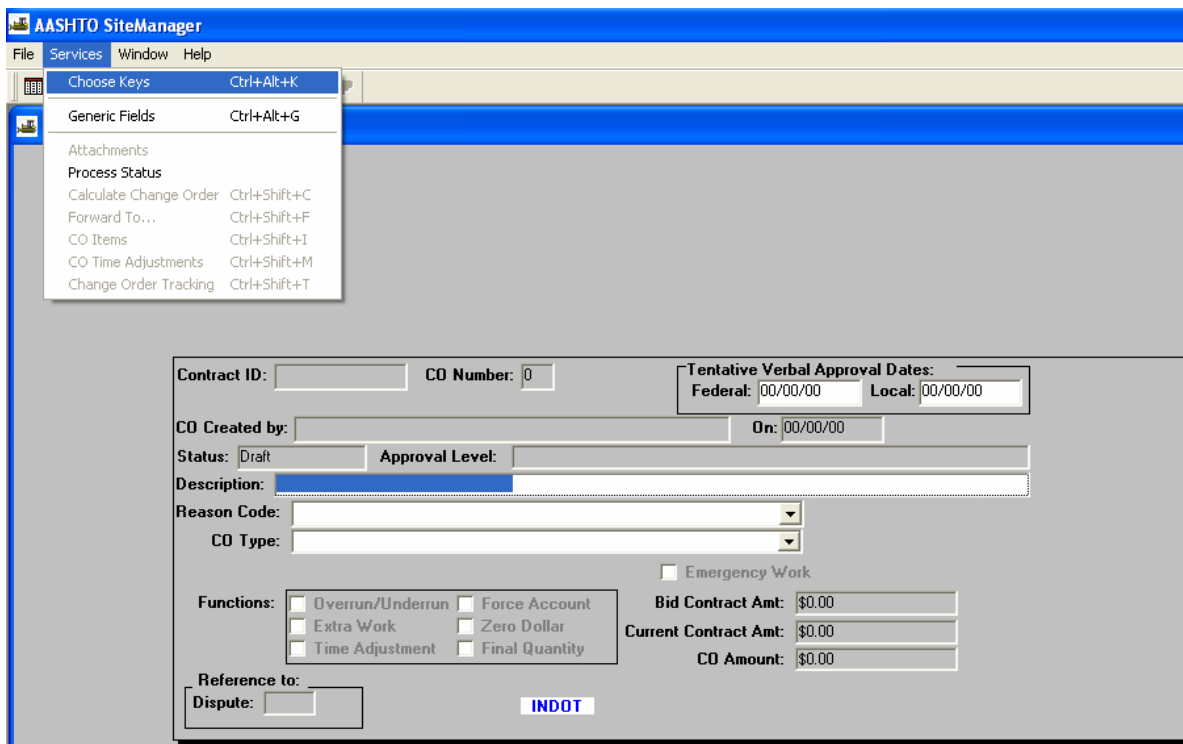
From the main panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**.



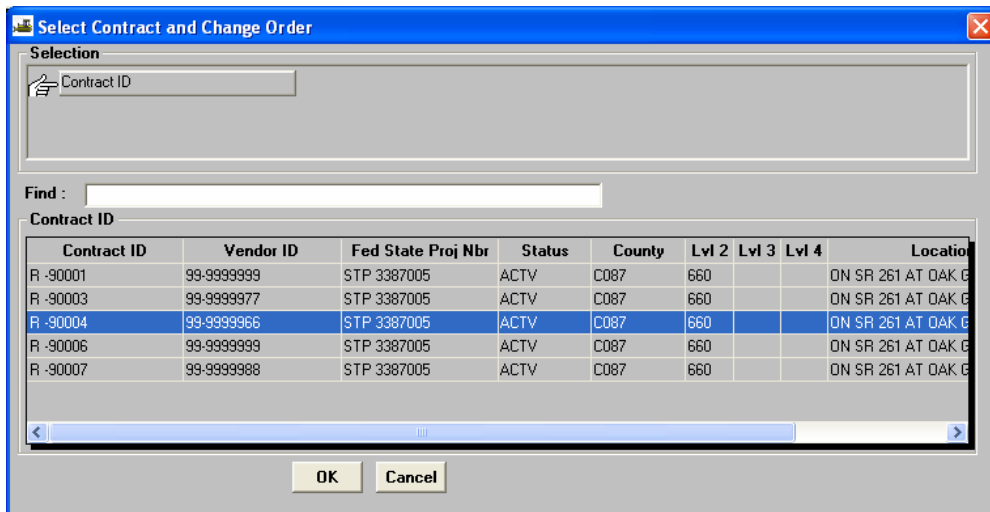
“Double-click” on **Header**.



The **Header** window will open up.

“Click” on **Services** located on the toolbar.

“Click” on **Choose Keys**.



AASHTO SiteManager

File Services Window Help

Header

Contract ID: R-90004 CO Number: 006 Tentative Verbal Approval Dates: Federal: 00/00/00 Local: 00/00/00

CO Created by: Clipper, Buzz On: 12/18/07

Status: Draft Approval Level:

Description: Enter a short general description of the change order here.

Reason Code: STANDARDS/SPECS CHANGE, Other

CO Type: SUPPLEMENTAL AGREEMENT

☐ Emergency Work

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☒ Zero Dollar ☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$658,493.35

Current Contract Amt: \$658,493.35

CO Amount: \$0.00

Reference to: Dispute: [INDOT](#)

Description: “Enter” a short general description for the entire change order.

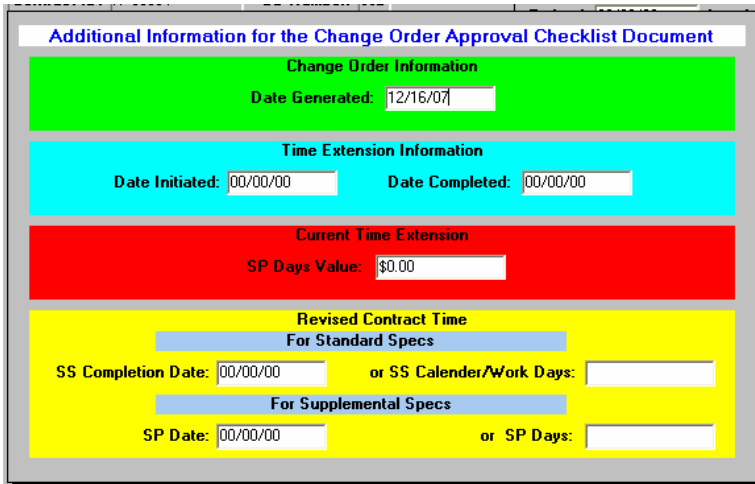
Reason Code: “Click” on the appropriate **Reason Code** for the entire order.

CO Type: “Click” on the appropriate **CO Type**.

“Click” on **Functions: Zero Dollar**

If this change order is referenced to a Dispute or Claim, “Right-click” on the **Dispute** Field and select the appropriate **Dispute/Claim**.

“Click” on the Generic Field  located on the toolbar.



Additional Information for the Change Order Approval Checklist Document

Change Order Information
Date Generated: 12/16/07

Time Extension Information
Date Initiated: 00/00/00 Date Completed: 00/00/00


Current Time Extension
SP Days Value: \$0.00

Revised Contract Time
For Standard Specs
SS Completion Date: 00/00/00 or SS Calendar/Work Days:
For Supplemental Specs
SP Date: 00/00/00 or SP Days:

Additional Information for the Change Order Approval Checklist Document opens up. “Enter” the appropriate **Date Generated** for the Change Order.

To close “Click” on the Generic Field  located on the toolbar.

“Click” the **Save**  button located on the toolbar.

Documents can be added to the change order Header by using the **Attachments**  button.

Refer to **A-2-11-2 Attaching a Document** for further information on attaching a document to this change order

“Click” on **Save**  located on the toolbar.

“Click” on the **Close**  button located on the toolbar.

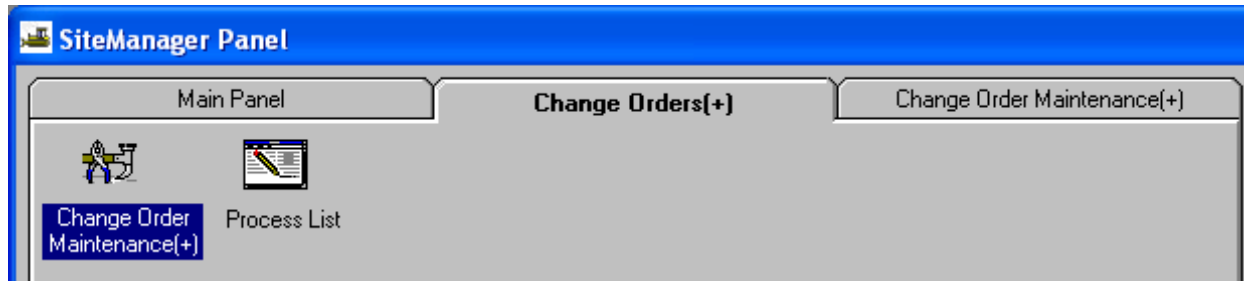
Follow the steps for adding **Change Order Explanations**, **Forwarding for Review**, and **Forwarding the Change Order for Approval** starting on Page 14 of this document.

Viewing the Item Summary

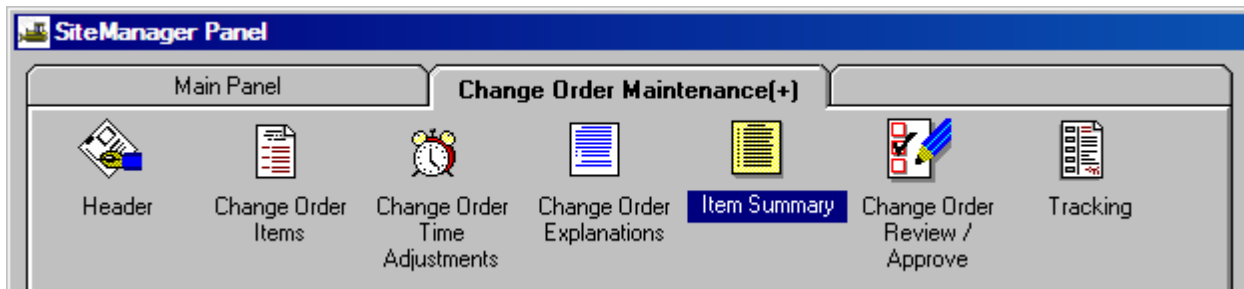
This section will explain how to view the details of the Items in Change Orders in any status (Draft, Pending, or Approved).



From the Main Panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**.



“Double-click” on **Item Summary**.

Change Order Items Select

Selection

Contract ID: R-90004

Change Order Items

Find:

Contract ID

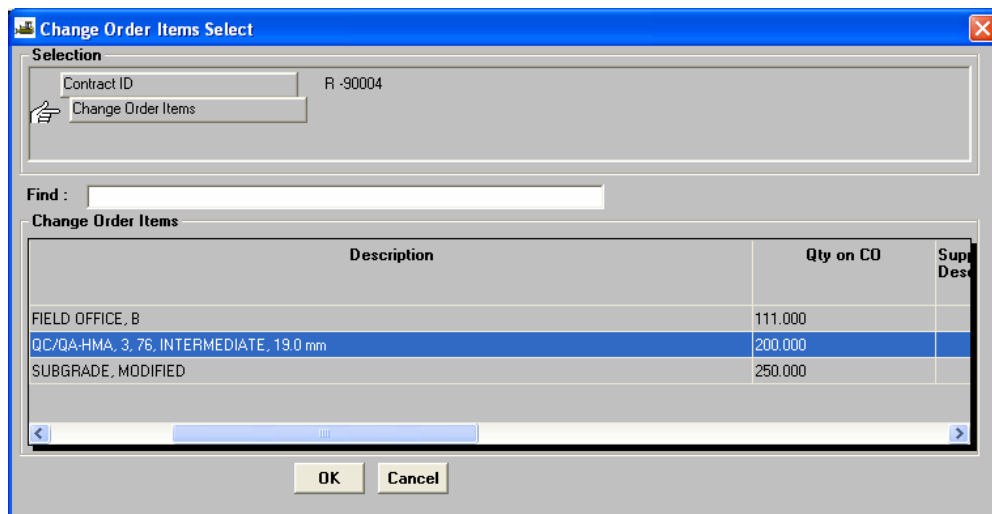
Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
R-90001	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C

OK Cancel

The **Contract and Change Order Selection Panel** will appear with the following information:

- **Contract ID:** the **Contract ID** is the identification number assigned to the contract.
- **Vendor ID:** the **Vendor ID** is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** the **Fed State Proj Nbr** is the assigned Federal or State Project Number.
- **Status:** the **Status** field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** the **County** field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** the **Lvl 2** column indicates the District office administering the contract.
- **Lvl 3:** the **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** the **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the physical limits of the contract.

“Double-click” on the appropriate **Contract ID**.



Change Order Items Select

Selection

Contract ID: R-90004

Change Order Items

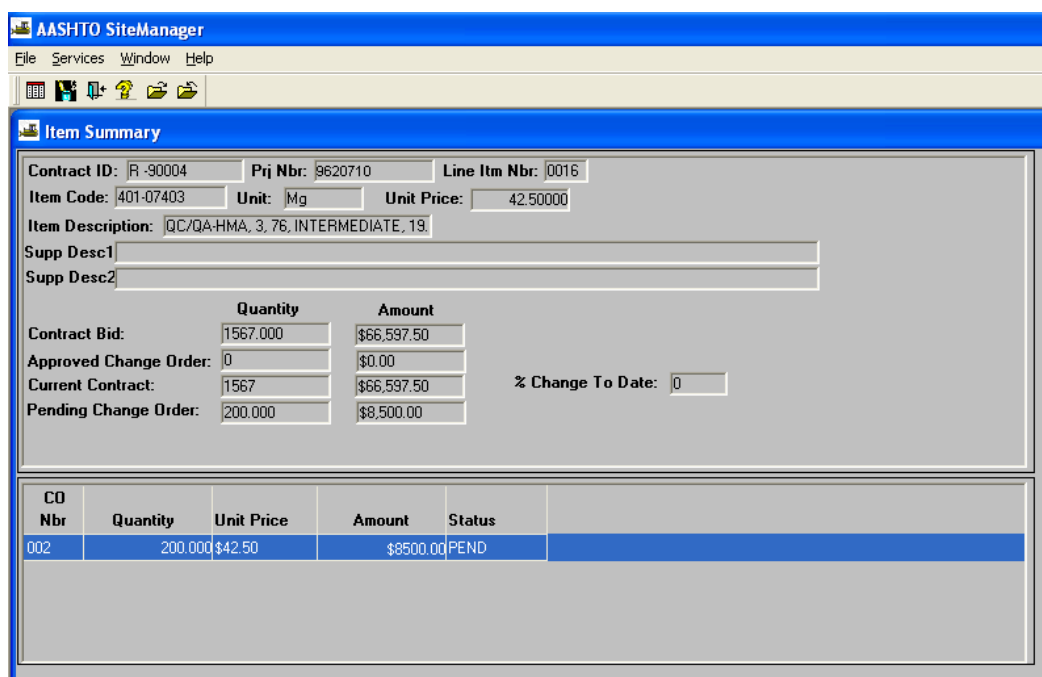
Find:

Change Order Items

Description	Qty on CO	Supp Desc
FIELD OFFICE, B	111.000	
QC/QA-HMA, 3, 76, INTERMEDIATE, 19.0 mm	200.000	
SUBGRADE, MODIFIED	250.000	

OK Cancel

“Double-click” on the appropriate **Item Nbr** to be viewed.



AASHTO SiteManager

File Services Window Help

Item Summary

Contract ID: R-90004 Pri Nbr: 9620710 Line Itm Nbr: 0016

Item Code: 401-07403 Unit: Mg Unit Price: 42.50000

Item Description: QC/QA-HMA, 3, 76, INTERMEDIATE, 19

Supp Desc1

Supp Desc2

	Quantity	Amount	
Contract Bid:	1567.000	\$66,597.50	
Approved Change Order:	0	\$0.00	
Current Contract:	1567	\$66,597.50	% Change To Date: 0
Pending Change Order:	200.000	\$8,500.00	

CO Nbr	Quantity	Unit Price	Amount	Status
002	200.000	\$42.50	\$8500.00	PEND

The information associated to the selected item is available to review. This information includes;

- **Contract Bid:** includes only the original contract quantities.
- **Approved Change Order:** includes only the approved CO quantities.
- **Current Contract:** includes only the original contract amount plus the approved change quantities.
- **Pending Change Order-** includes only the Pending CO quantities
- **% Change To Date-** computed using only the Approved CO quantities.

NOTE: the quantities associated to a change order in draft status will not be included in the quantities in the top panel.

AASHTO SiteManager

File Services Window Help

Item Summary

Contract ID: R-90004 Proj Nbr: 9620710 Line Item Nbr: 0016

Item Code: 401-07403 Unit: Mg Unit Price: 42.50000

Item Description: QC/QA-HMA, 3, 76, INTERMEDIATE, 19.

Supp Desc1

Supp Desc2

	Quantity	Amount
Contract Bid:	1567.000	\$66,597.50
Approved Change Order:	0	\$0.00
Current Contract:	1567	\$66,597.50
Pending Change Order:	200.000	\$8,500.00

% Change To Date: 0


CO Nbr	Quantity	Unit Price	Amount	Status
002	200.000	\$42.50	\$8500.00	PEND

The bottom Panel lists the changes made to the work item by individual change order and the value of each change.

Also the status of the changes is noted as well.

“Click” the **Open**  button on the toolbar to proceed to another work item.

Or

“Click” on the **Close**  button on the toolbar to exit **Item Summary**.

Viewing the Item Summary

Exercise E-5-T Group Exercise

This exercise will demonstrate how to access the information contained in the Change Order Item Summary.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Order (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Item Summary** icon

“Double-Click” on appropriate **Contract ID**: R90003

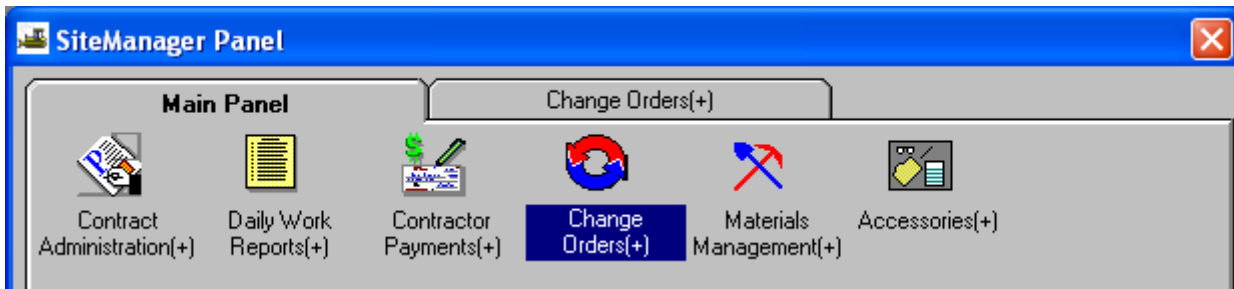
“Double-Click” on appropriate **Item Code**: 0007

Review information about that item

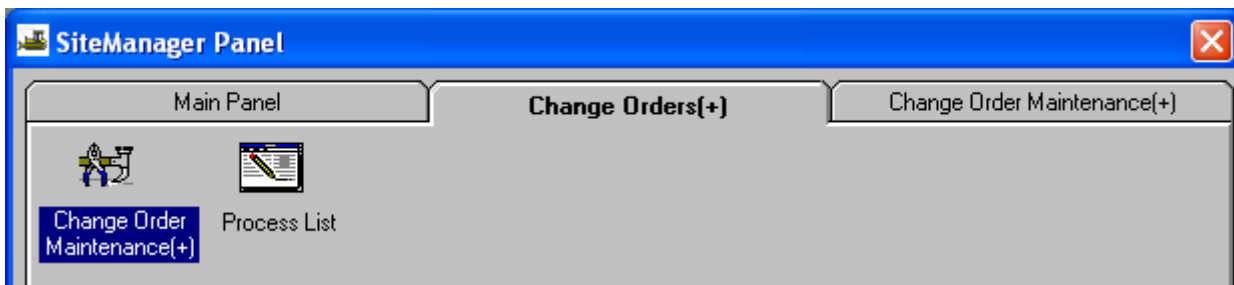
“Click” on **Close** located on the Toolbar.

Tracking a Change Order

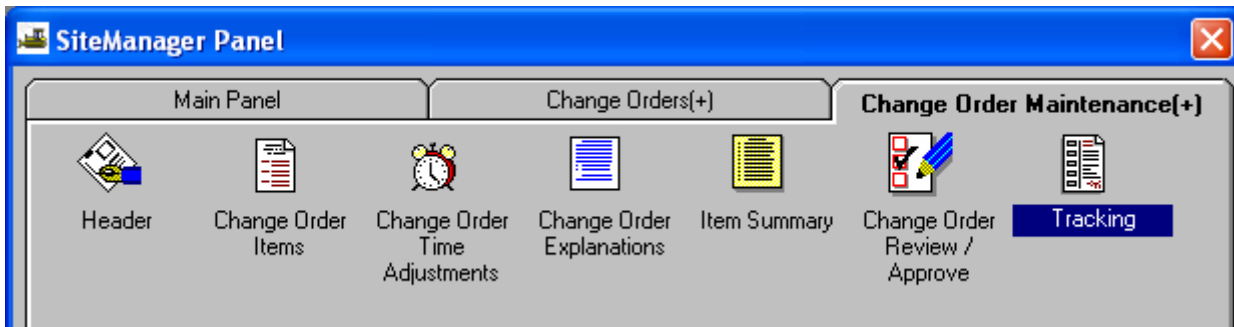
This section will explain how to track the reviewing and approval process of a change order.



“Double-click” on **Change Orders (+)** located on the Main Panel.



“Double-click” on **Change Order Maintenance (+)**.



“Double-click” on **Tracking**.

ChangeOrder Tracking Select

Selection

Contract ID
Change Orders

Find : _____

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C
R-90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OAK C

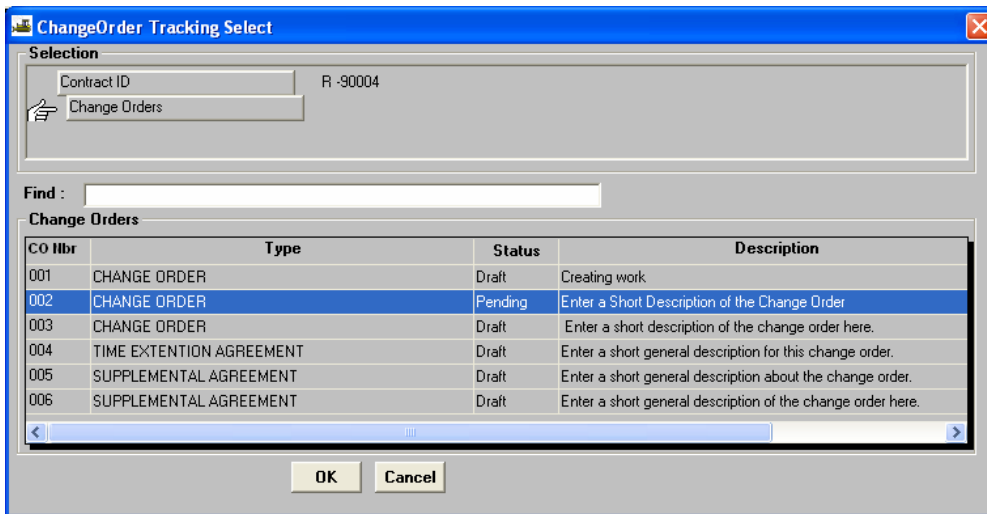
OK Cancel

The **Change Order Tracking Select** panel will open with the following information:

- **Contract ID:** the **Contract ID** is the identification number assigned to the contract.
- **Vendor ID:** the **Vendor ID** is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** the **Fed State Proj Nbr** is the assigned Federal or State Project Number.
- **Status:** the **Status** field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** the **County** field identifies the county where the majority of the work is located.
- **Lvl 2:** the **Lvl 2** column identified the District office administering the contract.
- **Lvl 3:** the **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** the **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the physical limits of the contract.

“Double-click” on the appropriate **Contract ID**.

This step will be skipped if a contract is already open.



ChangeOrder Tracking Select

Selection

Contract ID: R-90004

Change Orders

Find:

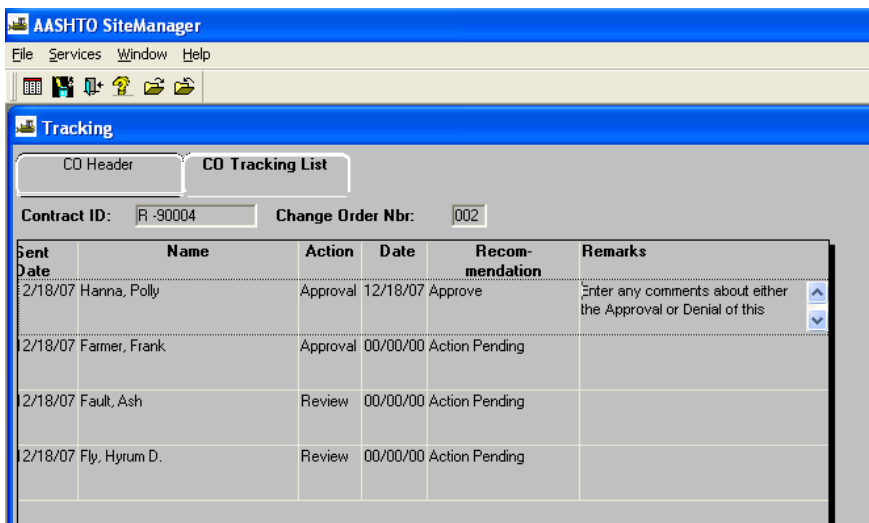
Change Orders

CO Nbr	Type	Status	Description
001	CHANGE ORDER	Draft	Creating work
002	CHANGE ORDER	Pending	Enter a Short Description of the Change Order
003	CHANGE ORDER	Draft	Enter a short description of the change order here.
004	TIME EXTENTION AGREEMENT	Draft	Enter a short general description for this change order.
005	SUPPLEMENTAL AGREEMENT	Draft	Enter a short general description about the change order.
006	SUPPLEMENTAL AGREEMENT	Draft	Enter a short general description of the change order here.

OK Cancel

“Double-click” on the appropriate **Change Order Nbr**.

This step will be skipped if a change order is already open.



AASHTO SiteManager

File Services Window Help

Tracking

CO Header CO Tracking List

Contract ID: R-90004 Change Order Nbr: 002

Sent Date	Name	Action	Date	Recommendation	Remarks
12/18/07	Hanna, Polly	Approval	12/18/07	Approve	Enter any comments about either the Approval or Denial of this
12/18/07	Farmer, Frank	Approval	00/00/00	Action Pending	
12/18/07	Fault, Ash	Review	00/00/00	Action Pending	
12/18/07	Fly, Hyrum D.	Review	00/00/00	Action Pending	

“Click” on the **CO Tracking List** tab.

This window will show the **Names** of the reviewers and/or approvers associated to the change order, the **Action** the reviewer took (review or approval), the **Date** the review or approval was made, **Recommendation**, and **Remarks**.

NOTES:

1. If a requested review or approval has not been made, the comment “**Action Pending**” will appear in the **Recommendation** column.
2. Changing from Pending Status to Draft Status will stop the action of a change order. The Change Order is effectively recalled.
3. Changing the Status back to Pending will reinitiate the approval/review process.

“Click” the **Close**  button located on the toolbar.

Tracking a Change Order

Exercise E-9-T Group Exercise

This exercise will demonstrate how to use the Change Order Tracking function.

Log into SiteManager as: d90afaul

Password: pass

Log in as: PE/S

Navigate from the **Main Panel**:

“Double-Click” on **Change Orders (+)** icon

“Double-Click” on **Change Order Maintenance (+)** icon

“Double-Click” on **Tracking** icon

“Double-Click” on appropriate **Contract Id**: R90003

“Double-Click” on appropriate **CO Nbr**: 1

Review **CO Header** information

“Click” on **CO Tracking List** Tab

Review **CO Tracking List** information

“Click” on **Close** located on the Toolbar